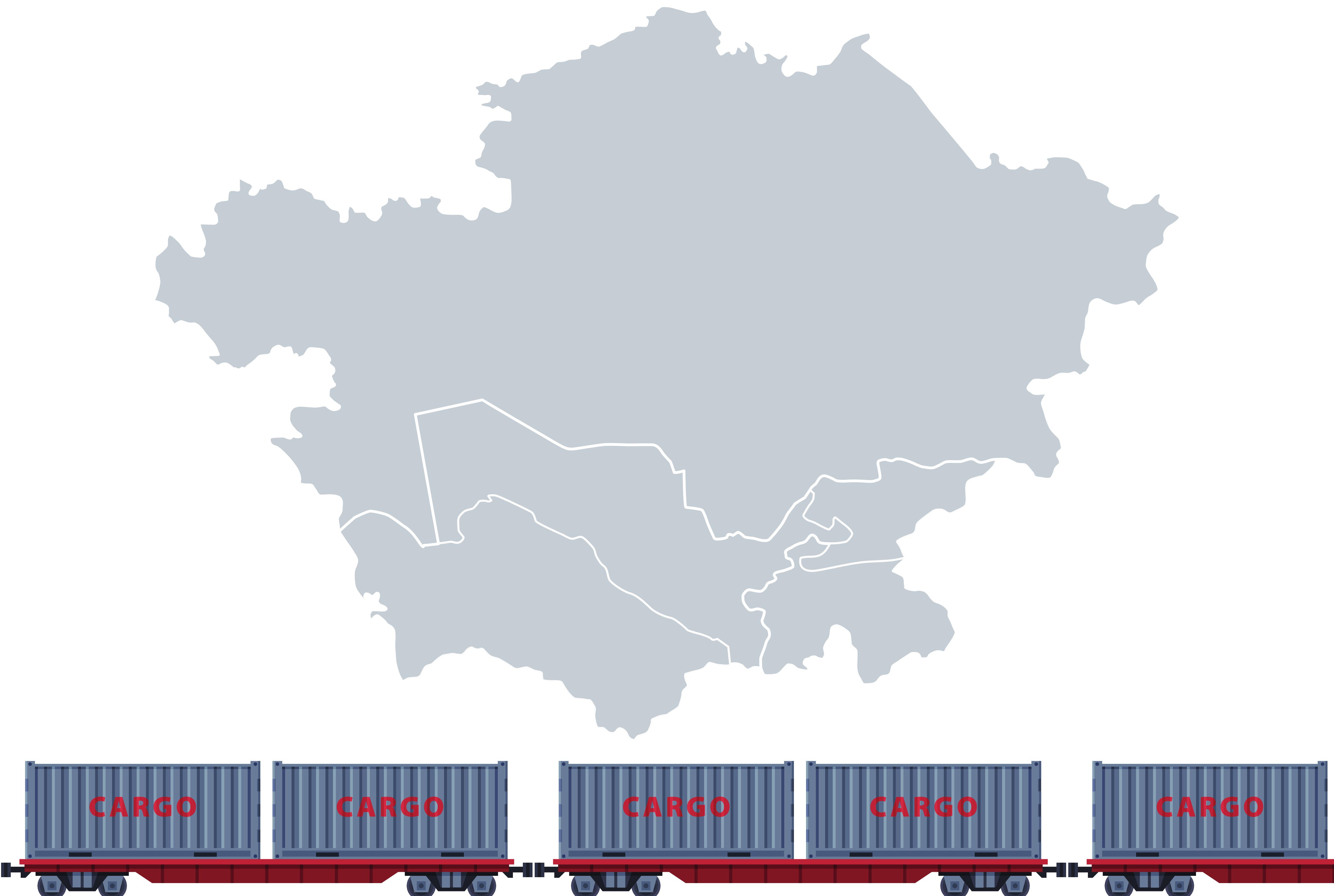
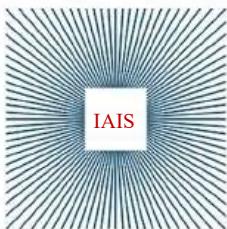


# Central Asia at the Epicenter of the Eurasian Transport and Logistics Landscape: From Strategies to Action





The University of World Economy and Diplomacy

**Institute for Advanced  
International Studies**

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# FROM THE AUTHOR

**Dear researchers, experts and colleagues,**

In 2025, Uzbekistan had the opportunity to further advance the implementation of the priority transport projects set out in the Concept for the Development of the Transport and Logistics System until 2030, which are designed to significantly increase the country's transit potential.

In April 2025, the actual construction of a 532.5-kilometer railway linking China, Kyrgyzstan and Uzbekistan along the Kashgar – Torugart – Makmal – Jalal-Abad – Andijan route began on the territory of Kyrgyzstan. Work is also underway on the the China – Tajikistan – Uzbekistan highway.

Both transport arteries have the potential to extend to the Caspian Sea, providing access to the South Caucasus and Turkey, similar to the Middle Corridor; to Iran with access to Turkey and Europe via the Southern Railway Corridor or to the Persian Gulf; and to Afghanistan with access to South Asia. This combination of routes would enable Central Asian states to significantly increase their exports of transport services, thereby improving their economic situation.

In July 2025, Uzbekistan, Afghanistan, and Pakistan signed a framework intergovernmental agreement on the development of a feasibility study for the construction of the Trans-Afghan (Kabul) Railway Corridor along the Termez-Nayabad-Maidanshahr-Logar-Kharlachi route, demonstrating the parties' unprecedented determination and commitment to creating a new transport architecture for Eurasia.

Meanwhile, Uzbekistan continues its pragmatic policy toward neighboring countries such as Azerbaijan, Iran, and Turkey, aiming to diversify trade and energy flows, actively engaging in the process of establishing promising logistics chains along the east-west axis. Of particular note is the deepening of ties with Tehran in the context of extending access to the Indian Ocean and effectively utilising transport infrastructure, including Iran's southern seaports, for export shipments.

This report includes analytical reports, research articles and policy briefs published by the Center for Strategic Connectivity in authoritative international publications and on the platform of the Institute for Advanced International Studies at the University of World Economy and Diplomacy over the course of the year. They attempt to critically reflect on the current state and prospects for strengthening transport connectivity in Central Asia, provide an objective view of cooperation dynamics among the region's states on this issue, highlight the most pressing problems and possible solutions, and analyse the geopolitical interests of global and regional powers in developing transit corridors through Central Asia.

In 2025, the Center for Strategic Connectivity presented its research findings on 'Cooperation of Central Asian Countries in the Field of Transport and Transit as a Factor in Strengthening Regional Integration' to the public. This work was included in the IAIS Research Nexus series of scientific publications. It can be found in the annual report's section dedicated to creating a unified transport space in Central Asia.

I hope you enjoy reading it!

Regards,



**Nargiza Umarova**

Head of the Center for Strategic Connectivity

## **CENTRAL ASIA AS A UNIFIED TRANSPORT SPACE**

# COULD CENTRAL ASIA BE A LAND BRIDGE FOR MONGOLIA?<sup>1</sup>

*by Nargiza Umarova*

Uzbekistan has launched a pilot transport corridor to Mongolia via Kyrgyzstan and China. Delivery of goods along the new 4,500-kilometre road route takes eight days. This gives domestic exporters additional access to the relatively unexplored Mongolian market, which is particularly relevant in light of the strengthening of trade and economic ties with this country.

The course for intensifying mutual trade was set last year, when the President of Mongolia made his first state visit to Tashkent. During high-level negotiations, the parties set the goal of increasing trade turnover several times over, which spurred the preparation of a preferential trade agreement. During the return state visit of the head of Uzbekistan to Ulaanbaatar on 24-25 June this year, this issue was once again prioritized.

Even under the current circumstances, bilateral trade indicators show steady growth. This is especially true for Uzbek exports, which in 2024 exceeded \$26 million in total, twice as much as a year earlier. This dynamic gives impetus to the development of inter-country transport links, with a particular focus on road transport, given the signing last year of an agreement between the governments of Uzbekistan and Mongolia. Given the growing demand for mutual transport, an agreement has been reached to double the number of permit forms, and preparatory work has begun on their electronic exchange based on the E-Permit system.

Uzbekistan supplies Mongolia with vegetables and fruits, food products, textiles and cars. There is enormous potential for expanding the range and volume of supplies of in-demand products. Its realization undoubtedly requires effective and reliable transport links between the countries.

Mongolia is bordered by two major powers, Russia and China, but has no direct access to the sea, which determines its complex geo-economic position. Although the country is a

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<sup>1</sup> IAIS Commentary Collection, June 26,2025 // <https://iais.uz/en/outputnew/could-central-asia-be-a-land-bridge-for-mongolia>

key link in the Russia-Mongolia-China economic corridor, which includes the cross-border railway Ulan-Ude-Naushki-Ulan Bator-Erlian-Beijing-Tianjin and a motorway to northern Chinese seaports, which brings certain financial benefits, Mongolia's transit capabilities are limited to this small geographical area. The expansion of trade routes to neighboring regions, including Central Asia, offers Ulaanbaatar great prospects in terms of diversifying its own exports.

However, the Central Asian region is not only a promising market for Mongolia, but also a land bridge to the world's oceans. In particular, Uzbekistan, given its desire to create a Trans-Afghan railway corridor with access to Indian Ocean ports, could become Mongolia's gateway to South Asia. The same effect will be achieved by connecting new freight routes from Mongolia to Uzbekistan with transport and transit corridors towards Iran, its southern seaports and the rest of Western Asia. In addition, transport links with Central Asian countries will open up a route for Mongolia to the South Caucasus, Turkey and Europe via the Caspian Sea. It is believed that after the construction of the China-Kyrgyzstan-Uzbekistan railway, all these connecting routes will become even more important and attractive due to the reduction in time and costs of transporting goods.

# COOPERATION OF CENTRAL ASIAN COUNTRIES IN THE FIELD OF TRANSPORT AND TRANSIT AS A FACTOR IN STRENGTHENING REGIONAL INTEGRATION<sup>1</sup>

by Nargiza Umarova

## Introduction

Central Asia, located in the heart of the Eurasian continent, plays an important role in the development of international trade routes in the East-West and North-South directions. The peculiarity of the region's geography, on the one hand, favors the realization of its transit potential, providing the opportunity to act as a link between the largest markets and receive economic benefits from this. But, on the other hand, the intracontinental location and significant remoteness from sea freight routes seriously hinder the economic growth of Central Asia.

The problem is exacerbated by the extremely low level of transport connectivity in the region. According to the [World Bank](#), Central Asian countries remain among the least connected economies in the world. In this regard, the share of costs for transporting foreign trade cargo reaches [50 percent](#) of the final cost of goods, which is four to five times higher than the global average.

The actual state of affairs in the field of transport communications of each country can be judged by the annually updated Logistics Performance Index (LPI). In recent years, some Central Asian countries have been able to improve their positions in this rating. For example, in 2023, Uzbekistan took 88th place among 139 countries, moving up [11 notches](#) compared to 2018. Kazakhstan has consolidated its position at 79th. But in general, the region has relatively low indicators in all LPI parameters, including the quality of infrastructure and transport services, their price attractiveness, timeliness of deliveries, and the efficiency of customs clearance of goods.

In addition to the objective reasons that hinder the establishment of transport connectivity in Central Asia, such as insufficient infrastructure investment and funds for the

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<sup>1</sup> IAIS Research Nexus #5, June 30, 2025 // <https://iais.uz/en/outputnew/cooperation-between-central-asian-states-in-the-field-of-transport-and-transit-as-a-factor-in-strengthening-regional-integration>

digitalisation of the transport sector, there are also administrative, legal and technical barriers that complicate the fast, uninterrupted movement of goods within the region.

Today, urgent decisions require questions implement a coordinated tariff policy, harmonise transport legislation, introduce a single shipping document and electronic document flow, reduce customs duties, increase the capacity of border checkpoints, and simplify customs procedures. Thanks to regular consultative meetings that marked a new round of regional integration, the leaders of the Central Asian countries have come to a common understanding of the relevance of these problems. Practical measures are being taken to effectively eliminate them. However, consolidation of efforts at the level of all five states has not yet been achieved.

It is important to note that in light of the resumption of the multilateral format of interaction, the Central Asian "five" decided to integrate into the global transport network not individually, but as a single entity. The primary task in implementing this approach is to bring the transport and communication systems of the states of the region closer together, which requires coordinated actions. For this purpose, it was proposed to create a Regional Center for the Development of Transport and Communication Interconnectivity under the auspices of the UN. It was also proposed to elaborate a Strategy for the Development of Regional Transport Corridors of Central Asia and adopt a Regional Program for the Development of Transport Communications. Years later, these initiatives have not been put into practice. Nevertheless, in light of the restart of the regional integration process, the Central Asian republics were able to achieve positive shifts in transport connectivity, which is expressed in the restoration and modernisation of key transport arteries connecting our countries, the launch of new trade routes, and an increase in transit cargo flow.

Particular activity is observed in the creation of international transport corridors with access to the largest seaports and world markets. Here, the republics of the region not only cooperate, but also compete with each other, sometimes giving exclusive preference to narrow country interests, which sharply contrasts with the spirit of Central Asian unity.

The article analyses the dynamics of transport and transit cooperation of Central Asian states, identifies its problem areas, determines the factors of strengthening interaction and competition between the countries of the region on the external transport and logistics track. Current transport projects of local and international importance are considered from the point of view of their impact on the development of intraregional connectivity.

The study used the method of content analysis, based on which a qualitative analysis of thematic publications and expert discussions from open sources was conducted. In particular, the final documents of the Consultative Meetings of the Heads of State of Central Asia, speeches of the presidents, releases of international conferences and specialised meetings, scientific articles, reports, analytical briefs, and media publications were studied.

The empirical material was collected by organizing online interviews with Central Asian (except Turkmenistan) transport communications specialists. Five experts working in the public and private sectors were involved in the study. They were selected based on personal contacts, with each one having practical experience in organizing and managing transit cargo transportation.

Most of the respondents preferred to remain anonymous.

The structured interview included four questions, which were supposed to assess the current dynamics of regional cooperation on transport connectivity, identify priority projects and factors hindering their implementation, as well as the degree of effectiveness of the consultative meetings format in developing the transit potential of Central Asia

## **The state of transport connectivity in Central Asia**

In light of the intensification of regional cooperation, the Central Asian states have declared a common strategy – to transform the region into a stable, economically developed and prosperous space. This vision was first [presented](#) by the President of Uzbekistan Shavkat Mirziyoyev at the international conference “Central Asia: One Past and Common Future, Cooperation for Sustainable Development and Mutual Prosperity”, held on November 10, 2017 in Samarkand.

The head of state identified the following priority tasks in achieving the intended goal: *first*, ensuring the growth of intraregional trade turnover; *second*, consolidating efforts to dramatically increase the transport and transit potential of Central Asia. The Uzbek leader spoke with a similar agenda at the first Consultative Meeting in Astana in March 2018.

Improving transport connectivity has a beneficial effect on the dynamics of trade and cargo transportation between countries, contributing to economic growth. Here, it is important to ensure the multi-variant nature of transport corridors with the parallel elimination of physical and non-physical obstacles in their work, which leads to a reduction in logistics costs, infrastructure and technological transformations. Prioritising the issue of

expanding transport links within the region gives impetus to Central Asian integration. This is evidenced by the following examples.

In March 2018, Uzbekistan and Tajikistan resumed interstate communication along the Galaba-Amuzang-Khoshadi railway route, which was discontinued in 2011. As a result, the volume of mutual trade increased by more than 50 percent and has been steadily growing since then.

In 2018, the Tashkent-Andijan-Osh-Irkeshtam-Kashgar automobile corridor was also launched, with a total length of 920 km. Thus, in a year, the Uzbek-Kyrgyz trade turnover almost doubled, amounting to 481 million US dollars. The implementation of another joint route is approaching – the Talas-Chatkal-Tashkent highway, which is planned to be used for transit traffic.

Uzbekistan and Kazakhstan, being the largest economies in Central Asia, pay special attention to the modernization of their transport networks. Today, the roads and railways of the two countries are mutually integrated. In recent years, a number of new projects have been initiated.

In 2021, the parties agreed to build the Uchkuduk-Kyzylorda road and railway, which will become an important part of the Trans-Caspian International Transport Route (TITR). The future highway will connect the Kyzylorda region of Kazakhstan with the industrial Navoi region of Uzbekistan and the Republic of Karakalpakstan. As a result, the distance and time between the regions will be reduced by 3-3.5 times, which will spur the development of border trade.

To intensify trade and logistics cooperation, the Central Asia Industrial Cooperation Center is being created in the border area of the Syrdarya region of Uzbekistan. The full launch of the complex is planned for 2030. Its activities will attract additional cargo flow to routes in both directions.

Another striking example of transport cooperation between Tashkent and Astana is the joint construction of the Darbaza-Maktaaral railway line. The new road will relieve the Kazakh checkpoint Saryagash and attract additional cargo flow of up to 10 million tons per year.

At the same time, to connect Uzbekistan with the western regions of Kazakhstan, it is planned to build the Beineu-Shalkar highway, which will become an important component of the transcontinental corridor Europe-Caucasus-Asia (TRACECA).

Turkmenistan demonstrates good dynamics in strengthening regional connectivity. In 2022, in partnership with Uzbekistan, work on the Ashgabat Agreement (multimodal corridor Uzbekistan-Turkmenistan-Iran-Oman) from 2011 was intensified. The railway route Uzbekistan-Turkmenistan-Iran-Turkey was launched, with a length of more than 4.5 thousand kilometres. Later, Tajikistan and Kazakhstan joined this combination. The issue with Kyrgyzstan is being worked out. Separately, there is a railway connection between Kazakhstan, Turkmenistan and Iran.

Several projects have been announced with the joint participation of Tajikistan and Turkmenistan (the construction of the Tajikistan-Afghanistan-Turkmenistan railroad – the TAT project), as well as Tajikistan and Kyrgyzstan (the China-Kyrgyzstan-Tajikistan-Afghanistan-Iran railway route or the Five Nations Railway Corridor).

Along with the creation and restoration of transport corridors, the Central Asian states are making efforts to harmonise legislation, unify transport standards, simplify customs procedures and introduce electronic data exchange systems. All this together stimulates economic growth. Thus, over the past 5 years, the volume of intraregional trade has almost doubled and reached \$11 billion. By the end of 2023 alone, the increase was 25 percent. And the cargo transportation in Central Asia has grown 2-3 times over the past year.

The experts involved in this study emphasised the high importance of the Consultative Meetings for the development of the transport and transit potential of Central Asia. According to Dauren Ilesaliev, Professor of the Tashkent State Transport University, the transition to the institutional stage of regional cooperation will serve to increase the efficiency of joint transport projects and closer integration of our countries into global supply chains.

Within the framework of the five-party format, regular meetings of transport ministers are held, which facilitates the coordination of efforts in the development of transport communications, the development of agreed approaches and the search for solutions to common problems. It is important that this process takes place not only at the state level, but also with the participation of representatives of business and public organisations.

## Expanding Transport Corridors: Partnership and Competition

In modern conditions, it is important for Central Asia not to close trade flows on itself, but to expand their geographic area. This approach is aimed at fully using the region's transit potential, which is a necessary condition for overcoming transport isolation. The key factor

here is the participation of the “five” in such international initiatives as “One Belt, One Road”, The International North–South Transport Corridor (INSTC), TRACECA and others. These projects are of interest to the Central Asian states in terms of diversifying export supplies and reducing dependence on traditional routes (transit through Russia, which is subject to unprecedented sanctions). In light of the escalation of geopolitical tensions in the world, the importance of land routes passing through the territory of Central Asia has increased many times over. Thus, the region has a unique chance to become a transport and transit hub of global importance.

It should be noted that the actualization of Central Asian transit is spurring the investment interest of major powers in the development of the regional transport services market. The main investors are China and the European Union. According to the China Global Investment Tracker, since the official launch of the Belt and Road Initiative in 2013 to date, China has [sent](#) over \$3.8 billion to Kazakhstan, about \$1.7 billion to Kyrgyzstan, \$730 million to Uzbekistan, and \$230 million to Tajikistan to support the transport sector.

In early 2024, the European Union [announced](#) a joint commitment to invest €10 billion in sustainable transport links in Central Asia. Japan, South Korea and the Gulf monarchies are also contributing to this cause to varying degrees. Based on the analysis of expert opinions obtained during research interviews and publicly available scientific materials on the topic of the study, the following transport corridors can be identified as being of great importance for strengthening intra-regional and intercontinental transport and trade links.

1. The Trans-Caspian International Transport Route (TITR), also known as the Middle Corridor, connects China and Europe via Central Asia, the Caspian Sea, Azerbaijan, Georgia and Turkey. Experts from the European Bank for Reconstruction and Development [identify](#) three main transit routes of the Middle Corridor:

- northern, goes through North Kazakhstan;
- central, goes through South Kazakhstan;
- southern, runs through the Kyrgyz Republic, Uzbekistan and Turkmenistan.

The TITR is an alternative to the Northern Corridor, the operation of which is hampered by anti-Russian sanctions. The route is actively developing, demonstrating a steady increase in transportation. In 2023, their volume amounted to [2.76 million tons](#), which is 65 percent more than last year. It is expected that in 2024 this figure will rise to 4.2 million tons.

Since the beginning of this year, container transit from China via the Middle Corridor has increased 14-fold. In just a couple of years, its throughput capacity could be expanded to 10 million tons of cargo per year. With proper development of infrastructure and terminal capacities, the Trans-Caspian route will become 35 percent faster and 40 percent cheaper than the Northern Corridor in the near future. To stimulate investment in the project, the European Commission and Kazakhstan launched the TITR Coordination Platform in June 2024.

Some researchers believe that the Middle Corridor will serve to a greater extent the trade relations between China and Turkey, as well as other beneficiary countries of the project. However, I do not agree with this statement, since in addition to China, another cargo-forming party, the European Union, is making considerable efforts to implement this route, having significantly updated land supply routes through Central Asia in recent years. In addition, the countries of the region themselves are striving to increase supplies to Europe using the potential of the TITR.

According to my observations, in the development of trans-Caspian communications in the western direction, the Central Asian states act as both partners and competitors. Partnership is expressed in the joint development of connecting routes that would allow representatives of the "five" to connect to one or another transit branch of the Middle Corridor. As mentioned above, Uzbekistan and Kazakhstan have agreed on the construction of the Uchkuduk-Kyzylorda railroad, which will be connected to the Kazakh part of the TITR.

Meanwhile, in 2019, Uzbekistan, in partnership with Kyrgyzstan, Turkmenistan, Azerbaijan, Georgia and Turkey, launched an alternative trade route to Europe via the Caspian Sea – the so-called CASCA+ (Central Asia – South Caucasus – Anatolia+) corridor. Recently, the countries participating in the route agreed to create a consortium, i.e. a special structure to coordinate the route's activities. Thus, the project is reaching the institutional level, which creates a serious foundation for increasing its competitive potential, as well as the transit capabilities of the countries of Central Asia and the South Caucasus.

Back in 2014, Kazakhstan, Azerbaijan and Georgia institutionalised the Middle Corridor. First, a Coordination Committee was established, which soon transformed into the International Association "Trans-Caspian International Transport Route". Both episodes indicate the isolated nature of the actions of the "five" in developing extra-regional transport communications, and this is fraught with the emergence of unhealthy competition that will

sow discord between the countries of the region. To avoid such scenarios, the Central Asian states should develop a coordinated approach to the implementation of transit transportation through the Caspian Sea along the China-Europe-China axis based on the principles of equality and mutual benefit. It is important to prevent the interests of one party from prevailing over the interests of the other. From this point of view, I consider it necessary to harmonise the work of the above-mentioned coordination structures - the consortium for the development of the CASCA+ corridor and the Association “Trans-Caspian International Transport Route”.

2. The China-Kyrgyzstan-Uzbekistan (CKU) railroad is considered one of the most ambitious transport projects in the region. The idea for the route dates back to 1997, but its practical implementation began only in 2022. On June 6, 2024, the parties [signed](#) an intergovernmental agreement on the construction of a railway line along the Kashgar-Torugart-Makmal-Jalal-Abad-Andijan route. Its total length will be 486 km.

The CKU railroad will reduce the time and cost of transporting goods between China and Central Asia, providing Kyrgyzstan and Uzbekistan with access to Chinese ports and markets, as well as improving the infrastructure of transport networks in the region.

Currently, it takes [2 days](#) to deliver goods from Chinese Kashgar to the borders of Uzbekistan by road instead of 10 days via Kazakhstan. The launch of the railway line will achieve even greater results. It is estimated that the trade route from East Asia to the Middle East and Southern Europe will be [reduced](#) by 900 km, and the delivery time of goods will be reduced by 7 days. In the future, the China-Kyrgyzstan-Uzbekistan railroad can function as an autonomous transport corridor serving the export-import cargo of the beneficiary countries of the project, or become an important component of intercontinental trade routes. The latter include:

- international multimodal route Asia-Pacific region countries-China-Kyrgyzstan-Uzbekistan-Turkmenistan-Azerbaijan-Georgia-Europe.
- multimodal routes along the China-Persian Gulf and China-Europe line in transit through Iran.

3. The International North-South Transport Corridor was initiated in 2000 by Russia, India and Iran. This project connects Central Asia with the Persian Gulf and South Asia via Iran and the Caspian Sea. It involves Kazakhstan and Turkmenistan, which, against the backdrop of the intensification of the route, are rapidly increasing their transit capabilities.

However, according to the experts I interviewed, the INSTC is to varying degrees beneficial to all Central Asian countries, since it promotes their transport connectivity and the development of mutual trade.

4. The Termez-Mazar-i-Sharif-Kabul-Peshawar railroad or Trans-Afghan Corridor is an equally ambitious project, promoted by Uzbekistan as the shortest route leading Central Asian countries to the Indian Ocean. In 2021, Uzbekistan, Afghanistan and Pakistan [agreed](#) to lay a railway line through Afghan territory to the border with Pakistan.

According to calculations, the transportation of goods from Pakistan to Uzbekistan via the 647 km Trans-Afghan Railroad will take only 3-5 days, instead of the current 35. And the cost of transporting one container will [decrease](#) almost 3 times. By 2030, the potential cargo flow along the new corridor will be about 22 million tons per year. Its bulk will be formed due to transit. This means that when the transport artery is launched, Central Asia will be able to generate cargo flows from major exporters, such as China and Russia, to Pakistani seaports, while strengthening internal transport links.

## What hinders development?

In an interview with experts in the field of transport and logistics, we asked them to name the factors hindering the transport convergence of the Central Asian states and their joint integration into international transport corridors. The answers can be grouped as follows:

1. Low coordination – often leads to slowdown or halt of strategically important initiatives. Despite common interests in transport issues, the Central Asian states are more eager to promote their own projects, which makes effective cooperation difficult.

In 2023, the European Bank for Reconstruction and Development published the results of a study on the sustainability of transport links between Europe and Asia. A group of international analysts concluded that Central Asia has a chance to ensure economic development by strengthening internal transport connectivity, which should lead to the creation of a Regional Transport System similar to the Trans-European Transport Network. To this end, it was recommended to create a single coordinating body with the status of a legal entity.

2. Different levels of infrastructure provision. While Kazakhstan and Uzbekistan are actively modernizing their transport networks, other countries in the region, such as

Tajikistan and Kyrgyzstan, face a lack of funds and technology to carry out similar work. This leads to uneven development of transport corridors and reduced efficiency of their use.

3. Lack of investment. Attracting financing for large infrastructure projects remains a challenge due to the risks associated with political instability, corruption and low transparency in the region. This discourages foreign investors and complicates the implementation of important initiatives necessary for the integration of Central Asian countries into international transport corridors.

4. Tariff and non-tariff barriers. High transit fees, complex procedures, different standards and inconsistency of customs regulations between countries create additional delays and increase the cost of logistics operations.

All respondents agreed that a comprehensive approach and coordinated actions by all five Central Asian states are needed to eliminate the above factors. Only through deepening cooperation and timely implementation of reforms can breakthrough successes be achieved in transport integration and strengthening the region's position in international transport corridors.

## Conclusion

To summarise the above, we note that the mechanism of regular Consultative Meetings of the Heads of State of Central Asia, launched in 2018, laid a solid foundation for intensifying regional cooperation in the field of transport and transit. The task of strengthening transport links between the countries and joint integration into international transport corridors has been prioritised. This will help overcome transport isolation, which seriously hinders the economic growth of the region. A positive effect is possible only if both processes proceed in unison and bring mutual benefit to the entire "five". As my analysis has shown, the main problem here is the lack of proper coordination at the regional level.

Weak coordination leads to duplication of projects and fragmentation of efforts to effectively implement them. This creates a paradoxical situation where, despite common interests in the field of transport communications, the Central Asian states act in a disjointed manner, focusing on their own priorities, which gives rise to unhealthy competition. Today, this trend is demonstrated by Kazakhstan and Uzbekistan, each of which has an alternative option for accessing the markets of Turkey and Europe via the Caspian Sea. The CASCA+ transport corridor initiated by Tashkent and two of the three existing transit routes of the Middle Corridor (northern and central), supported by Astana, are equally focused on servicing

transportation between China and the EU. In this case, both countries compete more than cooperate with each other.

In order to prevent such incidents, it is recommended to create a single coordinating body with the status of a legal entity. It is also important to develop common approaches to the development of international transport corridors and accelerate the process of adopting the Strategy for the Development of Transport Corridors in Central Asia, which was announced back in 2018. The issue of creating a Regional Center for Transport and Communications Interconnectivity under the auspices of the UN remains relevant.

Given the growing dynamics of regional integration, as well as the most favorable conditions for increasing the transit potential of Central Asia, the "five" should focus on eliminating bottlenecks in transport convergence. There is an urgent need to implement a coordinated tariff policy, harmonise transport legislation, introduce a single shipping document and electronic document management practices, reduce duties, increase the throughput capacity of border checkpoints, and simplify customs procedures. Within the framework of the five-sided interaction format, active work is underway in this direction. However, consolidation of efforts at the level of all five states has not yet been achieved, which requires careful work.

# WHY DO THE SCO COUNTRIES NEED A UNIFIED TRANSPORT SPACE?<sup>1</sup>

*by Nargiza Umarova*

In global politics, the words and actions of major powers are often the first to be scrutinized, which can foster a misleading perception of their outsized role in advancing key decisions and initiatives. Yet this is not always the case. Smaller states, too, are capable of setting the tone on the international agenda. A vivid example of this was seen at the anniversary summit of the Shanghai Cooperation Organization (SCO) in Tianjin, China.

The Central Asian states form the very core of the SCO. At their current stage of development, they are emerging as responsible actors in international relations, increasingly aware of the need to pool efforts in building a shared regional destiny. The first signs of this long-anticipated regional cohesion can be discerned in the remarkable alignment of positions on pressing foreign-policy issues.

At the Tianjin summit, the leaders of the Central Asian states spoke with remarkable unanimity on strengthening regional security, dismantling trade barriers, harnessing water, energy and transit potential more effectively, and attracting investment to promising sectors of industrial production — including the extraction and processing of critical minerals. Importantly, these priorities were articulated not from a position of petitioning for support, but from one of agency and initiative. Hence the bold and forward-looking ideas placed on the table before the larger “Shanghai family”. One proposal in particular deserves closer attention.

The President of Uzbekistan advanced the initiative of creating a unified SCO transport space — in essence, a call for an extensive network of digitalized transport corridors linking all SCO members, irrespective of geography.

At the heart of this significant initiative lies a structural challenge: the fragmented integration of road and railway networks among SCO countries. For instance, India and Pakistan — the largest states in South Asia and full members of the SCO — lack direct access to Central Asia and to the northern latitudes of Eurasia, such as Russia and Belarus. Existing

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<sup>1</sup> IAIS Commentary Collection, September 8, 2025 // <https://iais.uz/en/outputnew/why-do-the-sco-countries-need-a-unified-transport-space>

routes between these macro-regions are prohibitively long and costly, significantly constraining trade flows.

Consider also the case of Iran. As a pivotal actor in Eurasia's transit architecture and a participant in the Southern Railway Corridor linking East and Central Asia with Europe, Iran nevertheless remains insufficiently integrated into the transport networks of the Central Asian republics — and more broadly, the CIS space, many of whose members are part of the SCO. Divergent transport regulations, shipping documentation, technical standards, and border-customs regimes undermine the effective functioning of interregional transport corridors, with predictable negative consequences.

Uzbekistan is preparing to operationalize the Trans-Afghan (Kabul) Corridor — the Termez–Naybabad–Maidanshahr–Logar–Kharlachi route — envisioned as a transport bridge connecting Europe, China and South Asia. This project is expected to dovetail with the ambitious China–Kyrgyzstan–Uzbekistan high-mountain railway and the Northern Corridor. Together, they will dramatically expand the export and transit capacity of Central Asian states, securing long-sought direct rail access to the Indian Ocean ports.

Preliminary estimates indicate that Uzbekistan and Kazakhstan could attract an additional transit flow of up to 20 million tons annually, while Kyrgyzstan and Tajikistan could receive as much as 5 million tons per year. To prepare for such a prospect, Uzbekistan is already urging SCO partners to institutionalize the concept of a unified transport space. Its realization would ostensibly fall under the purview of the Council for the Integration of Railway Spaces of SCO Countries, the establishment of which — with headquarters in Tashkent — was proposed a year ago.

# UZBEKISTAN AND TURKMENISTAN ARE FORMING A TRANSPORT AND TRANSIT TANDEM<sup>1</sup>

by Nargiza Umarova

**Tashkent's transport strategy places great importance on cooperation with Turkmenistan, which has high transit potential due to its convenient location.**

Turkmenistan connects the states of Central Asia with Iran and the vast Middle Eastern region, thus providing access to the warm southern seas. The launch of the Tejen-Serakhs-Mashhad railway line in 1996 gave Uzbek exporters access to the world ocean via the Iranian port of Bandar Abbas for the first time.

Work on the Uzbekistan-Turkmenistan-Iran-Oman multimodal transport corridor project was reactivated in 2022 after being launched in 2016. This was facilitated by intensified dialogue between Uzbekistan and Turkmenistan regarding transport logistics, as well as Tashkent's practical interest in the capabilities of Iran's deep-water port of Chabahar in the southeast.

Chabahar has also been designated a key link in the International North-South Transport Corridor (INSTC), which is promoted by India and Russia. Ashgabat is one of the key beneficiaries of this project thanks to the Kazakhstan-Turkmenistan-Iran railway, which was inaugurated in 2014.

Turkmen transit plays a critical role in linking Central Asia with the European Union via Iran and Turkey by land. Uzbekistan is attracted to this geographical advantage, as it has high hopes for the full functioning of the Southern Railway Corridor to Europe. With construction of the China-Kyrgyzstan-Uzbekistan railway finally underway, the project has become a strategic priority for Uzbekistan, as preliminary calculations suggest it could reduce the distance between East Asia and Europe by 900 km and delivery times by 7–8 days.

In December 2022, the first freight train departed from Tashkent Central Railway Station on the Uzbekistan-Turkmenistan-Iran-Turkey route, covering a distance of over 4,500 km.

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<sup>1</sup> The Diplomat, November 18, 2025 // <https://thediplomat.com/2025/11/uzbekistan-and-turkmenistan-are-forming-a-transport-and-transit-tandem/>

On November 1, 2023, the transport ministers of the four countries [signed](#) a protocol on the further development of the new corridor during a meeting of the Economic Cooperation Organization, calling on China, Kyrgyzstan and Tajikistan to join the initiative.

To optimize land transportation to Europe, China is [supporting](#) railway routes through Kazakhstan, including the China-Kazakhstan-Turkmenistan-Iran-Turkey and China-Kazakhstan-Uzbekistan-Turkmenistan-Iran-Turkey routes. However, the future China-Kyrgyzstan-Uzbekistan railway could significantly alter these supply chains, strengthening the competitive advantage of Tashkent and Bishkek. Tajikistan, which borders western China and plans to construct an international highway to Uzbekistan, is also ready to join these connectivity efforts. This will create the shortest multimodal route from East Asia to Europe, with Dushanbe playing an active role.

One important feature of Turkmenistan as a transit country is its modern port infrastructure. The Caspian port of Turkmenbashi, which [opened](#) in 2018, can handle 17 million tons of cargo per year, excluding petroleum products. It has terminals for ferries, passengers and containers. The Balkan shipyard in Kenar is also operational. Turkmenbashi is recognized as a vital link in the Trans-Caspian International Transport Route (TITR), also referred to as the Middle Corridor, connecting Central Asia with the South Caucasus. During Turkmen President Serdar Berdimuhamedov's state visit to Uzbekistan on November 17, 2025, the two countries agreed to jointly develop the Turkmenbashi port. This could indicate Tashkent's potential investment participation in the project.

Geopolitical tensions around the world are having a negative impact on the dynamics of intercontinental maritime transport through strategic transport hubs such as the Strait of Malacca and the Suez Canal. This is prompting global exporters, including China, to redirect some of their cargo to land-based trade routes. In this context, the importance of the Middle Corridor is increasing, with its capacity growing steadily thanks to the participating countries' collective efforts to improve its soft and hard infrastructure. In 2024, [4.5 million tons](#) of cargo were transported via the Middle Corridor from Kazakhstan onward to Georgia, representing a 62 percent increase on the previous year. The World Bank [forecasts](#) this figure will increase to 11 million tons by 2030. Transcontinental trade is expected to account for 40 per cent of the projected volume, including the potential transit of 1.3 million tons of cargo from Uzbekistan to Europe.

Due to its geographical proximity, Uzbekistan favors trans-Caspian transportation via the Turkmenbashi port. In 2019, Tashkent [initiated](#) the launch of the CASCA+ (Central Asia–South Caucasus–Anatolia) transport corridor, which focuses on utilizing the railway and maritime infrastructure of Kyrgyzstan, Turkmenistan, Azerbaijan, Georgia and Turkey for export deliveries to the EU. In 2024, the participating countries [agreed](#) to establish a consortium to coordinate the activities of the route. This marks a significant step toward the project's institutionalization, creating a solid foundation for enhancing its competitive potential, as well as the transit capabilities of Central Asian and South Caucasian countries.

On November 12, 2025, a meeting of transport ministers from Central Asian countries was [held](#) in Tashkent to the CASCA+ corridor. They discussed the creation of a unified digital transport platform to optimize logistics procedures and speed up the movement of goods.

Uzbekistan is a consistent advocate for strengthening interconnectivity in Central Asia, developing transport diplomacy with neighbouring states and regions and thereby [emphasising](#) its commitment to regional consolidation.

# TRANSPORT INTEGRATION AND STRATEGIC COMPETITION BETWEEN UZBEKISTAN AND KAZAKHSTAN: IMPLICATIONS FOR REGIONAL CONNECTIVITY AND EURASIAN TRANSIT CORRIDORS<sup>1</sup>

*by Nargiza Umarova*

Uzbekistan and Kazakhstan are the two largest economies in Central Asia, and their economic structures are largely complementary, creating favorable conditions for deeper regional integration. After many years of stagnation, a new phase of multilateral regional cooperation began in 2018 with the [launch of the High-Level Consultative Meetings](#) among Central Asian states. This renewed engagement was driven primarily by the transformation of Uzbekistan's foreign policy following the ascendance to power of President Shavkat Mirziyoyev in 2016, who [declared](#) Central Asia the top strategic priority of Tashkent's diplomacy.

In advancing cooperation with neighboring states, Uzbekistan has consistently articulated a vision of Central Asia as a stable, economically developed, and prosperous region. This vision was [outlined by Mirziyoyev](#) at the international conference "Central Asia: One Past and Common Future, Cooperation for Sustainable Development and Mutual Prosperity" in Samarkand. There, he identified two priority tasks for regional development: first, accelerating the growth of intraregional trade; and second, consolidating efforts to increase transit and logistics capacity across Central Asia. These processes reinforce each other: the intensification of mutual trade requires sustainable transport corridors, and the expansion of corridors increases trade volumes. A similar agenda [was reiterated](#) at the first Central Asian Summit in Astana, where progress in modernizing transport infrastructure and opening new land and air routes connecting the region's countries was noted as a tangible success of political rapprochement.

Tashkent's position emphasizes that integration into the global transport system must occur collectively, not individually. The Strategy for the Development of the Transport System

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<sup>1</sup> Turan Research Center at the Yorktown Institute, November 25, 2025 //  
<https://www.turancenter.org/analysis/transport-integration-and-strategic-competition-between-uzbekistan-and-kazakhstan-implications-for-regional-connectivity-and-eurasian-transit-corridors>

of Uzbekistan until 2035 [states that aligning](#) national transport and communication systems is essential for unlocking the region's transit potential and improving access to global markets. This analysis examines the dynamics of transport cooperation between Uzbekistan and Kazakhstan within the broader regional and international context, identifies bottlenecks, and evaluates competitive pressures shaping the two states' transit strategies.

## State of Transport Connectivity Between Uzbekistan and Kazakhstan

As a double-landlocked country, Uzbekistan depends heavily on the transit capacity of its neighbors to access international trade routes. Kazakhstan plays an especially important role in this regard due to its geographic position, extensive rail network, seaports, and direct land borders with both China and Russia. Presently, the transport systems of Uzbekistan and Kazakhstan are mutually integrated, supporting dynamic trade growth. By the end of 2024, bilateral trade [exceeded \\$4.3 billion](#), reflecting high transport connectivity and coordinated border management.

Both states lie at the crossroads of major Eurasian trade corridors linking China, Europe, Russia, Turkey, Iran, and the countries of South Asia. This geographic positioning encourages bilateral and regional connectivity initiatives. Among the most significant agreements is the project to construct the Uchkuduk–Kyzylorda highway and railway, supported by a [joint action plan](#) signed in December 2021. This corridor would link the Kyzylorda region of Kazakhstan with Uzbekistan's Navoi region and the Republic of Karakalpakstan, reducing travel time and distance between the regions by [3-3.5 times](#). Improved connectivity is expected to stimulate cross-border trade and strengthen the border regions as drivers of economic growth.

Both governments also [agreed to establish](#) the International Center for Industrial Cooperation “Central Asia” in the Syrdarya (Uzbekistan) and Turkestan (Kazakhstan) regions, a complex was [launched](#) on 15 November 2025 during the state visit of Kazakhstan's President Kassym-Jomart Tokayev to Tashkent. This platform aims to develop joint logistics capacity and attract additional cargo flows. Another important project is the construction of the Darbaza–Maktaaral railway line, which will reduce congestion at the Saryagash checkpoint—the busiest crossing between the two countries — and increase throughput by [10-14 million](#)

[tons](#) per year. To enhance connections with western Kazakhstan, [plans are underway](#) for the Beineu–Shalkar highway, intended to strengthen the Europe-Caucasus-Asia (TRACECA) corridor and expand Central Asia's access to the Caspian Sea.

## Cooperation and Competition in International Transport Services

Alongside physical infrastructure development, regional governments have worked to harmonize legislation, unify transport standards, digitize customs procedures, and adopt electronic data exchange systems. As a result, intraregional trade has nearly doubled over the past five years to [reach \\$11 billion](#), and the Central Asian freight transport market [expanded 2-3 times](#) in 2023. Analysts attribute this growth to the increasing role of Kazakhstan, Uzbekistan, and Kyrgyzstan in global supply chains.

Tashkent, in particular, has pursued policies to increase its transit potential. International freight volumes passing through Uzbekistan have increased at an average annual [rate of 8 percent](#). In 2024, [more than 13.9 million tons](#) of cargo were transported in transit across the country along more than 100 separate routes, some of which operate jointly with Kazakhstan.

Kazakhstan and Uzbekistan thus act simultaneously as partners and competitors in developing new transport corridors. Cooperation includes automobile and railway routes through Kyrgyzstan-Uzbekistan-Kazakhstan-Russia-Belarus-EU, Kyrgyzstan-Uzbekistan-Kazakhstan-Caspian Sea-Azerbaijan-Georgia-Black Sea region or Georgia-Turkey-EU, and China-Kazakhstan-Uzbekistan-Turkmenistan-Iran.

Kazakhstan holds a strategic advantage due to its direct rail links with China, giving it an essential role in the China-EU- China supply chain. Uzbekistan, however, seeks to secure a significant position within these flows through alternative multimodal corridors such as the Kyrgyzstan-Uzbekistan-Turkmenistan-Caspian Sea-Azerbaijan-Georgia-Black Sea region or Georgia-Turkey-EU route under TRACECA, and the Kyrgyzstan-Uzbekistan-Turkmenistan-Iran-Turkey-EU route.

A key development strengthening Uzbekistan's position is the China-Kyrgyzstan-Uzbekistan highway, which reduced cargo delivery time from China to Uzbekistan from [10 to 2 days](#) compared to the route through Kazakhstan. Construction of a parallel railway on the Kashgar–Torugart–Makmal–Jalal-Abad–Andijan route [began in December 2024](#), and is

expected to significantly shift cargo dynamics in favor of Uzbekistan and Kyrgyzstan by bypassing Kazakhstan's monopoly on direct rail access to China.

While the two states cooperate through multiple regional transport initiatives, they also demonstrate competitive behavior. The Trans-Caspian International Transport Route (TITR) or the Middle Corridor provides a clear example. Since the start of the war in Ukraine and disruption of the Northern Corridor through Russia due to sanctions, demand for the Trans-Caspian route has surged. Cargo volumes along TITR [reached 4.5 million tons](#) in 2024, and container transit from China increased fourteen-fold. According to the International Transport Forum, with adequate investment, TITR could [expand to 10 million tons](#) annually and become 35 percent faster and 40 percent cheaper than the northern route.

The European Bank for Reconstruction and Development [identifies three main transit routes of the Middle Corridor](#): a northern branch through northern Kazakhstan, a central branch through southern Kazakhstan, and a southern branch through Kyrgyzstan, Uzbekistan, and Turkmenistan. Uzbekistan, Kyrgyzstan, Turkmenistan, Azerbaijan, Georgia, and Turkey [launched the CASCA+ corridor](#) in 2019, and in 2024 [established a consortium](#) to coordinate governance and investment. By contrast, Kazakhstan [institutionalized the TITR](#) in 2014 with Azerbaijan and Georgia, forming the International Association “Trans-Caspian International Transport Route.” These parallel initiatives risk undermining regional coherence and fostering unhealthy competition.

Similarly, both states show diverging interests in transit solutions through Afghanistan. Uzbekistan has actively promoted the Kabul Corridor since 2018, and in 2021 Uzbekistan, Afghanistan, and Pakistan signed a roadmap for the [\\$6.9 billion](#) Trans-Afghan railway. In 2023, a project office opened in Tashkent, followed by offices in Kabul and Islamabad, and in July 2025 the three parties signed a framework intergovernmental agreement to develop a feasibility study for the project. Meanwhile, Kazakhstan has [partnered with Turkmenistan](#) to advance a separate project along the Torghundi–Herat–Kandahar–Spin–Boldak route. Construction of the first 22-kilometer Torghundi–Sanobar segment [began in September 2024](#), and Kazakhstan [pledged \\$500 million](#) toward extending it to Herat.

The absence of coordination in these initiatives illustrates structural tensions in Kazakhstan–Uzbekistan cooperation, where competition for transit revenues and international influence can override the stated objective of collective regional integration.

## Conclusion and Policy Implications

Despite strong rhetorical commitment to regional partnership, Uzbekistan and Kazakhstan often prioritize national interests in external logistics and transit competition. Statements by the Kazakh leadership emphasizing Kazakhstan as “the main logistics hub of Eurasia” reflect an aspiration to maintain a dominant regional role. At the same time, Uzbekistan increasingly pursues diversified transit corridors to reduce dependence on Kazakhstan’s infrastructure. Both strategies are understandable, yet uncoordinated competition risks weakening the collective geopolitical and economic potential of Central Asia.

Strengthening regional transport integration requires Uzbekistan and Kazakhstan to develop joint coordination mechanisms to align transport strategies, tariff policies, digital customs systems, and investment planning. Coordinated tariff decisions would increase predictability and enhance competitiveness relative to external corridors. Collaborative work to improve Logistics Performance Index indicators — including infrastructure quality, service capability, customs efficiency, and on-time delivery — would strengthen both countries’ positions as transit hubs.

A more coherent approach to trans-Caspian transit management is essential. Establishing a unified supervisory framework integrating CASCA+ and the International Association TITR would mitigate the risks of institutional fragmentation, create a single negotiating platform with global partners and investors, and prevent duplication of infrastructure spending. A consolidated structure would also enhance the region’s bargaining position with external actors such as China, the EU, Turkey, and Middle Eastern funders.

Given the similar objectives of the eastern (Uzbekistan–Afghanistan–Pakistan) and western (Turkmenistan–Afghanistan–Pakistan) Trans-Afghan railway routes, the Central Asian states should agree on a mutually beneficial architecture for accessing South Asian markets and ports on the Indian Ocean. Combining investment and technical resources would accelerate implementation, reduce political and financial risk, and prevent potential rivalry for transit flows.

Finally, advancing the “Strategy for the Development of Transport Corridors in Central Asia,” the “Regional Program for the Development of Transport Communications,” and the “Agreement on Joint Development of the Transport System in Central Asia” — first proposed in 2018 — remains essential. Establishing a Regional Center for Transport and

Communications Interconnectivity under the United Nations would institutionalize cooperation, strengthen integration, and support economic resilience.

The experience of Uzbekistan and Kazakhstan illustrates both the opportunities and challenges of transport-driven regionalism. While progress is significant, only a coordinated approach can enable Central Asia to realize its full potential as a vital bridge in Eurasian connectivity.

## **DEVELOPMENT OF TRANS-AFGHAN ROUTES: CURRENT PROJECTS FOR UZBEKISTAN**

# RUSSIA SEEKS TO EXTEND TRANSPORT ROUTES TO AFGHANISTAN<sup>1</sup>

by Nargiza Umarova

## Executive Summary:

- Western sanctions against Russia have hampered northern cargo transportation routes used by most Eurasian states, leading Russia to increase relations with the Taliban government on transport communications to connect to the South Asian market.
- Extending the International North-South Transport Corridor to Afghanistan and Pakistan will be beneficial for Moscow in avoiding the consequences of the escalating military conflict in the Middle East, which could involve Iran.
- Russia's participation in the development of trans-Afghan communications could lead to a conflict of interests between the Central Asian states implementing their own transport projects in partnership with the Taliban.

On November 25, 2024, Russian Security Secretary Sergei Shoigu met with Afghanian Deputy Prime Minister Abdul Ghani Baradar. The parties discussed the construction of the Trans-Afghan Railway to Pakistan, which Russia views as part of its flagship project, the International North-South Transport Corridor (INSTC) ([Interfax](#), November 26, 2024). Western sanctions against Russia due to its war in Ukraine have hampered the operation of northern cargo transportation routes used by most Eurasian states. This increased the importance of the southern transit direction. Afghanistan may be one of the beneficiaries of this, along with some Central Asian countries, Iran, and Pakistan, due to its convenient geographical location.

Since regaining power, the Taliban has resumed almost all previously announced regional and interregional transport projects and proposed new ambitious initiatives. In July 2024, Kazakhstan, Turkmenistan, and Afghanistan discussed the construction of the Torghundi-Herat-Kandahar-Spin Boldak railway spanning from the Turkmenistan border to Pakistani ports in the Indian Ocean (see [EDM](#), July 10, 2024; [The Times of Central Asia](#), July 22, 2024). The new route is projected to be an alternative to the Kabul Corridor (Termez-

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<sup>1</sup> The Jamestown Foundation, January 15, 2025// <https://jamestown.org/russia-seeks-to-extend-transport-routes-to-afghanistan/>

Mazar-i-Sharif-Kabul-Peshawar railway). Competition between them is inevitable, but it is more likely to have a positive effect. The launch of additional trade routes through Afghanistan will lead to cheaper transportation costs, which will benefit their profitability. This will stimulate the interest of external actors, including Russia, in the development of trans-Afghan communications.

Russia connects the extension of Afghanistan's transit capabilities to the INSTC. This international transport corridor has three transit routes: western, which goes through Azerbaijan; trans-Caspian; and eastern, which goes through Kazakhstan and Turkmenistan. The fourth branch of the INSTC, from Moscow's position, should be formed by railway arteries running through Afghanistan toward Pakistan.

The extension of the INSTC to Afghanistan and Pakistan will be beneficial for Russia amid the escalation of the military conflict in the Middle East. This conflict could involve Iran, which is a vital link in the complex supply chain between India and Russia (see [EDM](#), July 13, 2022). The potential for increased tension in the Persian Gulf and the Strait of Hormuz, where Iranian ports are located, increases the attractiveness of the Afghan-Pakistani direction of the INSTC.

Notably, Uzbekistan instigated the idea of creating a transport corridor along the North-South axis toward ports in Pakistan, which is now considered the fourth (southern) transit branch of this project. In 2022, Tashkent proposed launching the 5,532-kilometer (3,437-mile) multimodal route Belarus-Russia-Kazakhstan-Uzbekistan-Afghanistan-Pakistan-ports on the Indian Ocean (see [EDM](#), October 26, 2022; [Uzbekistan Daily](#), November 26, 2022). A year later, the parties signed a memorandum on its implementation ([Yangi O'zbekiston](#), November 2, 2023). This new route will allow goods to be delivered from northern Eurasia to South Asia in 20 days. This would be an effective replacement for trade routes through the Black, Mediterranean, and Red seas, which have become unsafe amid the war in Ukraine and Israel's escalating conflict in Gaza.

Moscow has expressed support for the construction of both the Western (from the border of Turkmenistan) and Eastern (from the border of Uzbekistan) trans-Afghan railway ([Interfax](#), November 26, 2024). This will allow Tashkent and Ashgabat to attract more transit cargo, increasing the economic attractiveness of their flagship transport projects involving Afghanistan.

Despite the broad prospects for a transport connection with Pakistan via Central Asia and Afghanistan, Moscow is developing other alternatives for entering the South Asian market. By March 2025, Russia plans to launch container trains to Pakistan on the INSTC via Kazakhstan, Turkmenistan, and Iran ([Mehr News Agency](#), December 5). The proposal of a branch from the Iranian transport network toward Pakistan, which has long had a railway connection, was discussed in detail during Russian-Pakistani talks on December 3, 2024, in Moscow ([Russian Transportation Ministry](#), December 4, 2024). This route will compete with the newly emerged transport corridor Belarus-Russia-Kazakhstan-Uzbekistan-Afghanistan-Pakistan-ports on the Indian Ocean. To avoid losing transit flows, Tashkent needs to expedite the construction of the Kabul Corridor ([Afghanistan International](#), April 26, 2024). Laying the first section of the route from Naibabad to Puli Khumri using its own funding could help attract potential investors for the new railway and, simultaneously, give impetus to the development of the southern route of the INSTC through Uzbekistan and Afghanistan.

In an aim to diversify trade routes oriented to the East, Russia has also begun to look at the potential of the Southern Corridor of the Trans-Asian Railway in the Pakistan-Iran-Türkiye direction, which China has been actively restoring in recent years as part of the One Belt-One Road initiative (see [EDM](#), November 17, 2017). In December 2021, the Istanbul-Tehran-Islamabad freight train service was resumed after a ten-year hiatus ([RailFreight.com](#), December 22, 2021). This route will become an important element of the New Silk Road and significantly strengthen the position of land routes in the international freight transportation system.

A flagship project of the One Belt-One Road initiative is considered to be the China-Pakistan Economic Corridor (CPEC), which envisages, among other things, the construction of a railway from the Chinese city of Kashgar to the Pakistani port of Gwadar on the Arabian Sea ([Railway.supply](#), May 1, 2023). The route will be about 3,000 kilometers (1,864 miles) long and eventually be connected to railway networks in Iran and Türkiye, connecting China to Europe. Moscow will likely not take issue with such a multi-layered combination of routes, given the planned creation of the China-Mongolia-Russia Economic Corridor (CMREC) ([Russian Ministry of Economic Development](#), June 23, 2016). Russian cargo can be transported to Pakistan and beyond using CMREC and CPEC infrastructure if necessary. The route from Russia to Pakistan via China, however, will undoubtedly be long, difficult and expensive, likely making it a backup option.

Russia has been searching for new export markets and trade routes to save its own economy amid Western sanctions and rising tensions in the Middle East. Transportation via Afghanistan toward South Asia appears to be a feasible alternative to Europe. By actualizing the southern direction of transit, Moscow is increasingly forced to turn to the transport services of the Central Asian republics, giving them leverage over Russia. Simultaneously, Russia's participation in the development of trans-Afghan communications may lead to a conflict of interest of other involved parties, primarily the Central Asian states. As a precaution, it is important for the five republics in Central Asia to achieve synergy in the implementation of transport routes passing through Afghanistan and to establish mutually beneficial cooperation in this issue.

# TRANSPORT PROJECTS IN AFGHANISTAN: IRAN'S AMBITIONS AND A BALANCING CENTRAL ASIA<sup>1</sup>

by Nargiza Umarova

*In recent years, the Taliban government has successfully garnered the support of most Central Asian countries for the development of trans-Afghan transport infrastructure. Notably, Uzbekistan and Turkmenistan have demonstrated significant engagement in this endeavor, with each country advancing its own railway project traversing Afghanistan to reach the borders of Pakistan. These routes are expected to compete with one another, a dynamic that is anticipated to enhance their profitability through the implementation of flexible tariff policies aimed at maintaining sufficient cargo flow. The establishment of trans-Afghan rail corridors holds strategic significance not only for fostering connectivity between Central and South Asia but also for advancing Iran's aspirations to develop efficient transportation links with China via Afghanistan—a goal that the Taliban government has expressed its willingness to support.*

**BACKGROUND:** In May 2023, Afghan authorities approved the Mazar-i-Sharif-Herat-Kandahar railway corridor project, which spans 1,468 kilometers. A year later, plans were announced for the construction of the Spin Boldak-Kandahar railway, signaling the intention to extend the Kandahar route to Pakistan. Turkmenistan promptly capitalized on this development by proposing an alternative version of the Trans-Afghan Corridor, extending along the Torghundi-Herat-Kandahar-Spin Boldak route.

Subsequently, Kazakhstan joined the project at the invitation of Ashgabat, and in September 2024, the foundation was laid for a 22-kilometer railway line connecting the border station of Torghundi to Sanobar. This section will serve as the initial segment of the Torghundi-Herat transport corridor.

The Turkmen version of the trans-Afghan railway is regarded as an alternative to the Kabul Corridor (the Termez-Mazar-i-Sharif-Kabul-Peshawar railway), although the latter route is significantly shorter. Competition between the western route (originating from Turkmenistan's border) and the eastern route (originating from Uzbekistan's border) appears

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<sup>1</sup> The Central Asia-Caucasus Analyst, January 28, 2025// <https://www.cacianalyst.org/publications/analytical-articles/item/13841-transport-projects-in-afghanistan-irans-ambitions-and-a-balancing-central-asia.html>

inevitable. However, this competition is expected to yield positive outcomes, particularly through the reduction of transportation costs resulting from the launch of additional trade routes through Afghanistan. This cost efficiency is a critical factor driving the interest of external stakeholders in the development of trans-Afghan transport infrastructure.

The establishment of the Torghundi-Spin Boldak international transport corridor holds particular importance for Tehran, which intends to develop a railway link with Afghanistan through the border town of Zaranj.

Since 2020, as part of the broader development of Iran's deep-sea port of Chabahar, [construction](#) has been underway on the Chabahar-Zahedan railway. This railway is planned to extend further into Afghanistan, reaching the provinces of Nimroz and Kandahar. Recently, Afghan authorities announced the [completion](#) of engineering surveys for the construction of the Zaranj-Kandahar railway. This integrated infrastructure will provide Iran with an additional avenue to access Afghanistan, while also establishing a direct connection to Herat—one of Afghanistan's largest and most strategically significant cities.

Tehran's long-term strategic vision positions Herat as a pivotal hub for transit routes connecting Western, Central, and Eastern Asia. This perspective stems from the concept of the China-Kyrgyzstan-Tajikistan-Afghanistan-Iran railway corridor, commonly referred to as the "Five Nation Road." Iran has already initiated the practical implementation of this vision through the construction of the Khaf-Herat railway, which is [scheduled](#) to become operational in 2025. Once completed, the route will extend to Kashgar in China via Central Asia, covering an approximate distance of 2,000 kilometers.

**IMPLICATIONS:** Iran has consistently encouraged Afghan authorities to collaborate with their Central Asian partners in advancing the railway corridor connecting Khaf to Kashgar.

In 2017, Uzbekistan and Afghanistan reached an [agreement](#) to construct the Mazar-i-Sharif-Sheberghan-Maimana-Herat railway. Integrating this new route with the Khaf-Herat railway would enable Uzbekistan to establish an alternative transit corridor to Iran, Turkey, and the Gulf countries, bypassing Turkmenistan. Additionally, this development would have a substantial impact on the implementation of the Five Nation Transit Route, as the Khaf-Herat-Mazar-i-Sharif railway constitutes a critical segment of the Afghan portion of this corridor. From Mazar-i-Sharif, transportation links would only need to be extended to Sher Khan Bandar in Kunduz province to connect with Tajikistan's border.

However, in 2018, Tashkent [introduced](#) a new trans-Afghan railway project toward Pakistan, known as the Kabul Corridor, effectively placing the implementation of the Mazar-i-Sharif-Herat route on hold. This decision was likely influenced by the recognition that the railway to Herat could undermine Uzbekistan's transit interests. By prioritizing the Kabul Corridor, Uzbekistan sought to secure its role in servicing freight flows from China, Kyrgyzstan, and Tajikistan to Iran, Turkey, and Europe.

Despite these developments, progress on the China-Kyrgyzstan-Tajikistan-Afghanistan-Iran railway corridor continued. In 2019, Afghanistan and Tajikistan [signed](#) an agreement to construct the Jaloliddini Balkhi (Kolkhozobod)-Panji Poyon-Sherkhan Bandar railway. To finance the feasibility study for this project, Dushanbe sought assistance from prominent international donor organizations, including the World Bank and the Asian Development Bank.

At that time, establishing a railway connection between Afghanistan and Tajikistan was also pivotal for the development of the Turkmenistan-Afghanistan-Tajikistan (TAT) transport corridor, [initiated](#) in 2013. This corridor extends from the Tajik border into northern Afghanistan, passing through the cities of Kunduz, Khulm, Mazar-i-Sharif, Sheberghan, and Andkhoy. At the Akina checkpoint, the railway crosses into Turkmenistan, from where it can connect to the Caspian Sea. This route aligns with the concept of reviving the ancient Lapis Lazuli Corridor, which aims to provide Afghanistan with direct access to European markets via the Caspian Sea, Azerbaijan, and Turkey.

In 2016, Turkmenistan [completed](#) the first stage of the TAT railway, spanning the Atamurat (Kerki)-Ymamnazar-Akina route. By early 2021, the Akina-Andkhoy railway line also became [operational](#). However, the abrupt change of power in Afghanistan during the summer of 2021 led to the suspension of work on these projects. This pause stemmed from uncertainty regarding the Taliban government's approach to relations with neighboring countries and its foreign policy on transport communications. Yet contrary to initial expectations, the new leadership in Afghanistan adopted a notably more pragmatic stance on these matters.

The Taliban have reactivated nearly all regional and interregional transport projects. [Announcements](#) have been made regarding the planned launch of the Andkhoy-Sheberghan and Sheberghan-Mazar-i-Sharif railway lines in the coming years, as well as the construction

of the Mazar-i-Sharif-Herat railway. These initiatives aim to bridge critical gaps in major trade corridors, including the TAT and the Five Nation Railway Route.

Notably, even Tajikistan, despite its tough stance toward the Afghan government, has become more active in advancing trans-Afghan transport initiatives. In July 2024, Tajikistan's Ministry of Transport and the Korea International Cooperation Agency (KOICA) [signed](#) a protocol to develop a feasibility study for a 51-kilometer Jaloliddini Balkhi-Panji Poyon railway, which will connect to Afghanistan via the Sher Khan Bandar checkpoint. As previously mentioned, this railway will form part of the TAT.

Integration into such international transport corridors will offer Tajikistan a strategic advantage on southern transit routes. However, the modernization of existing infrastructure and the construction of new railways demand significant financial resources, which Dushanbe struggles to provide. Tajikistan relies heavily on China for foreign investment. Beijing has a vested interest in developing fast and efficient transportation routes to access emerging markets in South Asia, the Middle East, and Europe.

If the Taliban succeed in persuading Tajikistan to collaborate on developing trade routes to China, this could significantly reshape Central Asia's transport architecture while enhancing Afghanistan's strategic importance as a regional transit hub. Iran would also benefit from a direct connection to China that bypasses Turkmenistan, Uzbekistan, and Kazakhstan.

For Tashkent, however, this development could present a serious challenge given the resolve of its neighbors to complete the TAT.

**CONCLUSIONS:** The proactive efforts of the Taliban government in developing international transport links has heightened the interest of most Central Asian states (with the exception of Tajikistan) in strengthening trade and economic ties with Kabul. This includes the potential implementation of joint investment projects, such as the construction of railways, gas pipelines, and power lines, which could foster regional connectivity and economic growth.

External major powers are also eager to capitalize on these transformations, but their interference in establishing trans-Afghan transport infrastructure could have adverse consequences for Central Asia.

Iran's ambitions to establish a transport corridor to China via Afghanistan pose the potential to alter the balance of power within the regional transit system. Such a development

would bolster the positions of Tajikistan and Kyrgyzstan, which are currently in a transport deadlock and reliance on Uzbekistan for access to global markets.

The development of new trade routes through Afghanistan represents a positive trend that will inevitably influence Central Asia due to the region's geographical proximity. This shift offers regional states the opportunity to enhance their transit and trade capacities, albeit accompanied by increased competition. To mitigate the risks of intense rivalries, the Central Asian republics must reconcile their interests in light of Afghanistan's growing significance as a transit hub and formulate a coordinated strategy to advance interregional transport corridors, ensuring equitable benefits across the region.

# WHAT THE EXTENSION OF TRANSPORT CORRIDORS IN AFGHANISTAN MEANS FOR CENTRAL ASIA<sup>1</sup>

by **Nargiza Umarova**

*In the current geopolitical realities, Central Asia seeks to restore its historical role as a land-based transportation and logistics hub, facilitating connections between East and West, as well as North and South. Most of the region's countries promote their own projects including railways, gas pipelines, and power lines through Afghanistan, which offer them substantial economic and geopolitical advantages. However, the intervention of major powers, including Russia, China, India, and Iran, could create a serious conflict of interest on the trans-Afghan track. To mitigate risks, Central Asian states should implement a coordinated policy for developing the southern transit direction on a mutually beneficial basis.*

Since the onset of Russia's full-scale invasion of Ukraine, Central Asian countries have gained an opportunity to diversify their trade routes, resulting in a reduced reliance on Russia for transit. The current geopolitical context has enabled the region to gradually restore its historical role as a land-based transportation and logistics hub, facilitating connections between East and West, as well as North and South.

In developing international transport corridors, Central Asian states prioritize pay special attention to the southern transit route, where Iran and Afghanistan hold significant strategic positions. Both countries offer landlocked Central Asia critical access to open seas. While Iran has historically served as a gateway for the region, Afghanistan is only recently beginning to assume this role. This shift is demonstrated by the Taliban government's proactive efforts to advance major transportation initiatives in collaboration with its neighboring countries.

Since assuming power in Afghanistan, the Taliban have revived nearly all previously announced projects of regional and interregional importance. Work has been accelerated on the creation of the Kabul Corridor (Termez-Mazar-i-Sharif-Kabul-Peshawar railway), the construction of the Khaf-Herat, Mazar-i-Sharif-Herat and Herat-Kandahar railways. Additionally, negotiations have progressed on the launch of the Lapis Lazuli Corridor. Some

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<sup>1</sup> The Central Asia-Caucasus Analyst, March 12, 2025 // <https://www.cacianalyst.org/publications/feature-articles/item/13851-what-the-extension-of-transport-corridors-in-afghanistan-means-for-central-asia.html>

of these projects are being reconsidered by external stakeholders through the lens of their own strategic interests, leading to the emergence of new, ambitious initiatives. For instance, Turkmenistan reached an agreement with Afghanistan to construct the Torghundi-Herat-Kandahar-Spin Buldak railway, providing access to Pakistan's seaports. Subsequently, Turkmenistan invited Kazakhstan to participate in the project, recognizing its significant trade volume with Afghanistan and its geographical proximity to Russia and China—two of Eurasia's largest freight-generating hubs.

The new route will effectively provide an alternative to the Kabul Corridor, which is championed by Uzbekistan, while simultaneously advancing the Taliban's objective of connecting Afghanistan's major cities—Mazar-i-Sharif, Herat, and Kandahar—via rail. Establishing railway links between Turkmenistan and Afghanistan would also stimulate the development of the Lapis Lazuli Corridor, a project initiated in 2012 with strong support from Turkey and Azerbaijan.

The growing involvement of Central Asian countries in the trans-Afghan transportation sector presents a significant opportunity to fully realize the region's transit potential, offering substantial economic and geopolitical advantages. However, this increased engagement may also lead to competition among Central Asian states for new transport initiatives or prompt external rival forces to exploit these opportunities to advance their own interests.

## Long-term Plans for Afghanistan

In July 2024, Ashgabat and Astana reached an agreement to jointly promote the Trans-Afghan Railway Corridor along the Torghundi-Herat-Kandahar-Spin Buldak route. Shortly thereafter, Turkmen-Afghan negotiations took place in Kabul, where representatives from "Demiryolları" (Turkmenistan Railways) expressed their willingness to finance the construction of the railway from the Torghundi station (Afghanistan) to Herat. On September 11, 2024, the construction of the first section of this project, the 22-kilometer Torghundi-Sanobar railway line, was officially inaugurated with a ceremonial launch.

The Torghundi-Herat trade route offers the potential for expansion in three distinct directions: toward the borders of Pakistan, Iran, and the shores of the Caspian Sea. The latter option aligns with the vision of revitalizing the ancient Lapis Lazuli Corridor, which would link Herat with Ashgabat, extend to the Caspian port of Turkmenbashi, provide access to the Baku International Port, and continue through Georgia to Ankara and Istanbul. This strategic

configuration would enable Afghanistan to establish fast and reliable connections with Europe while simultaneously reducing its transit dependence on Iran, Pakistan, and, to some extent, Uzbekistan.

As for the Torghundi-Herat-Kandahar-Spin Boldak railway, its construction would represent a strategic achievement not only for Afghanistan but also for several major and middle powers in the surrounding region. While the route from Turkmenistan to Pakistan (926 km) is longer than the Kabul Corridor (647 km), on the way to Kandahar it can branch toward Iran, providing a valuable strategic advantage for the future transport corridor.

However, neither Ashgabat nor Astana appear to be considering the Iranian option at this stage. [According to official statements](#), their primary objective is to access the Pakistani market and, through it, reach India via maritime routes, as well as connect with the Persian Gulf countries via maritime routes. Although the prospect of reaching India remains uncertain due to the complex relationship between Islamabad and New Delhi, the focus on the Persian Gulf is viable. Additionally, Kazakhstan and Turkmenistan already have a railway connection with Iran, launched in 2014.

Iran is also interested in establishing an additional route to connect with Afghanistan and Central Asia, complementing the nearly [completed](#) Khaf-Herat railway. Together with India, the Islamic Republic has long been taking practical steps to advance this objective, which will be explored further.

In the meantime, it is worth noting that Turkmenistan, as the proponent of the alternative Trans-Afghan Corridor, is already considering strategies to secure sufficient cargo for the route. Typically, large-scale infrastructure projects of this nature are primarily designed to accommodate transit flows, thereby maximizing their economic returns. For instance, the Termez-Mazar-i-Sharif-Kabul-Peshawar railway was conceived with this approach in mind. According to projections, by 2030, the new route could handle approximately [22 million tons annually](#), with the majority of this volume generated through transit.

Ashgabat likely shares similar ambitions. The selection of Kazakhstan as a strategic partner is not coincidental, as Kazakhstan borders Russia, which, due to restricted access to the European market, is highly motivated to channel its products—particularly hydrocarbon resources—into the expansive South Asian market.

Since 2000, Russia, alongside India and Iran, has been advancing the International North-South Transport Corridor (INSTC) project, which encompasses three main transit routes: the western route through Azerbaijan, the trans-Caspian route via the Caspian Sea, and the eastern route through Kazakhstan and Turkmenistan. Reports indicate that a fourth route might soon be added. From Moscow's perspective, this addition should be the [Trans-Afghan railway](#).

A year ago, the Taliban [invited](#) Russia and Kazakhstan to participate in this project, a proposal that was accepted, with each party pursuing its own strategic objectives. Kazakhstan supports the construction of both trans-Afghan railways, recognizing that this dual approach would enhance its ability to choose the most advantageous transit country for accessing Afghanistan and potentially leverage competition to secure favorable tariff conditions. Another advantage for Kazakhstan will be its connecting role between Russia and the Central Asian republics bordering Afghanistan. This factor likely influenced Ashgabat's decision to pursue a long-term partnership with Astana in the trans-Afghan corridor initiative.

## Russian interests

Moscow has equally significant reasons for seeking closer cooperation with the Taliban government on transportation initiatives—primarily driven by the need to diversify export markets for its critical raw materials. It is plausible that, to achieve this objective, Russia may also express interest in participating in the [construction](#) of the Turkmenistan-Afghanistan-Pakistan-India (TAPI) Gas Pipeline, a project whose construction resumed in September 2024.

It is worth noting that the concept of establishing a new transport corridor along the North-South axis toward Pakistan—now regarded as the fourth (southern) transit branch of the project—was originally proposed by Uzbekistan. Amid rising demand for Afghan transit in 2022, Tashkent [suggested](#) launching a transregional route spanning Belarus, Russia, Kazakhstan, Uzbekistan, Afghanistan, Pakistan, and ultimately reaching the ports of the Indian Ocean, covering a total distance of 5,532 kilometers.

A year later, the involved parties formalized their intentions by [signing](#) a memorandum of understanding. The new corridor is expected to enable the transportation of goods from northern Eurasia to South Asia within 20 days, a transit time that is three times faster than traditional maritime routes. This proposed corridor offers a valuable alternative to trade

routes through the Black, Mediterranean, and Red Seas, which have become increasingly hazardous due to the ongoing war in Ukraine and the intensifying Palestinian-Israeli conflict.

Moscow's commitment to enhancing trade with South Asian countries through Afghanistan was underscored by the visit of a Russian delegation led by Secretary of the Security Council Sergei Shoigu to Kabul on November 25, 2024. During the talks, the Russian representatives [expressed support](#) for the construction of both the Western (Turkmenistan-Afghanistan-Pakistan) and Eastern (Uzbekistan-Afghanistan-Pakistan) railway corridors through Afghanistan. This endorsement offers Uzbekistan and Turkmenistan an opportunity to attract additional freight volumes, thereby significantly boosting the economic appeal of their flagship transport projects involving Afghanistan.

In its engagements with the Taliban government, Moscow consistently emphasizes the importance of achieving an intra-Afghan settlement. This stance aligns with [Russia's broader long-term objective](#) to deepen trade and economic cooperation with Kabul. Establishing peace and stability in Afghanistan is a prerequisite for building railways, gas pipelines, and other critical infrastructure. Many countries, including Russia, have expressed their readiness to support efforts aimed at restoring order, recognizing that this is essential for the successful implementation of ambitious infrastructure projects.

## India's Alternative Strategy and Iran's Ambitions

In the spring of 2023, the Taliban [announced](#) a plan to construct a 1,468-kilometer Mazar-i-Sharif-Herat-Kandahar railway. This project is presented as the shortest route connecting Moscow to New Delhi via Afghanistan. The initiative aligns closely with India's strategic interest in establishing transport connections with Afghanistan and Central Asia while bypassing Pakistan.

Since 2016, India has been [developing](#) the deep-water port of Chabahar in southeastern Iran, which was a critical step toward launching the Afghanistan-Iran-India trade corridor. Over time, the Iranian-Indian partnership in transit transportation has led to new ambitious projects, further enhancing connectivity in the region.

In 2020, Tehran [began construction](#) of the 628-kilometer Chabahar-Zahedan railway line. It is planned to extend this line to the city of Zaranj in Afghanistan's border province of Nimroz, and from there to Dilaram and Kandahar. The Afghan authorities have already conducted engineering surveys for the construction of the [Zaranj-Kandahar railway](#).

To bring the Indian route to the borders of Central Asia, it will be necessary to link the Zaranj-Kandahar transport corridor with the 811-kilometer Herat-Kandahar railway line, which represents the second section of the Trans-Afghan Railway starting from Torghundi station, and then extend it either toward Turkmenistan by constructing the Torghundi-Herat railway or toward Uzbekistan by developing the Mazar-i-Sharif-Herat railway.

Although it may appear that New Delhi is taking the lead in its partnership with Tehran to develop trade routes through Afghanistan, in reality, Iran maintains an independent stance on this issue. For the Islamic Republic, Afghan transit is not solely or primarily about gaining access to Central Asia; rather, it is a strategic move to establish a faster connection with its primary trading partner—China.

With the Khaf-Herat railway nearing completion, Iran plans to extend this line to the Wakhan Valley in Afghanistan's Badakhshan Province, where the borders of China, Pakistan, Afghanistan, and Tajikistan converge. This expansion will likely involve linking the Khaf-Herat railway to the Termez-Mazar-i-Sharif-Kabul-Peshawar corridor, taking into account the Taliban's previously announced plan to connect Mazar-i-Sharif and Herat by rail. This approach would create a more direct and efficient trade route between Iran and China, reinforcing Iran's broader geopolitical and economic objectives.

It is worth noting that through the highlands of Badakhshan traverses one of the ancient routes of the Great Silk Road, known as the Wakhan Corridor. In September 2023, Afghan authorities began laying gravel on a 50-kilometer section of this historic route, extending from the main Kyrgyz settlement of Bozai Gumbaz in the Lesser Pamir to the Wakhjir Pass, which marks the border between Afghanistan and China.

In August 2024, Afghanistan's Ministry of Rural Rehabilitation and Development announced the completion of preliminary work on the Wakhan Tract. The Taliban are actively seeking financial support from Chinese partners to transform this neglected route into a fully functional trade corridor, in which Iran is extremely interested. However, Beijing has adopted a cautious stance regarding the opening of its border with Afghanistan. This hesitation is likely influenced by lingering terrorist activity within Afghanistan. China is especially wary of Uyghur militants associated with the East Turkestan Islamic Movement (ETIM), which poses a potential security risk to its Xinjiang region.

From an economic perspective, integrating the Wakhan Corridor into the international transit system would be a valuable asset for China, which is actively investing in Afghanistan's

natural resources and expanding trade with the country. The Wakhan route offers a unique advantage by not only reducing the distance between China and Afghanistan but also improving connectivity between Pakistan and Tajikistan, whose borders converge in the complex geography of the Pamir Knot.

The development of the Wakhan Corridor could significantly alter the dynamics of the Central Asian transit landscape by enhancing Tajikistan's strategic position. With this route, Tajikistan could facilitate direct connections between South and Central Asia through its territory. However, such a transformation could undermine the ambitions of Uzbekistan, Turkmenistan, and Kazakhstan, all of which are striving to secure a strong foothold in the transport connectivity of two critical macro-regions.

## Conclusion

The proactive policy of the Taliban government to expand Afghanistan's transit potential, combined with the focus of certain Central Asian countries on southern transit routes, has elevated the region's relationship with Kabul to a new level. Most Central Asian states (with the exception of Tajikistan) are rapidly advancing trade, economic, and investment cooperation with Afghanistan.

Uzbekistan is spearheading several joint initiatives with the Taliban, most notably the construction of the Termez-Mazar-i-Sharif-Kabul-Peshawar railway. Over the past year, Turkmenistan and Kazakhstan have also intensified their engagement, promoting their own vision of the Trans-Afghan Corridor, which would provide access to Pakistani ports. While competition between these two ambitious projects is inevitable, it is likely to manifest in a complex, dual nature.

**Firstly**, the existence of alternative trade routes through Afghanistan will reduce transportation costs, thereby enhancing the overall profitability of these transit corridors.

**Secondly**, the development of trans-Afghan transport routes aligns with Russia's strategic interests, as it presents an opportunity to extend its flagship North-South Transport Corridor to Pakistan. Moscow's involvement in the creation of both the western (from Turkmenistan's border) and eastern (from Uzbekistan's border) railway routes through Afghanistan will enable Tashkent and Ashgabat to attract a portion of the freight flows from

Northern Eurasia to South Asia. Consequently, competition for transit traffic between these Central Asian states appears inevitable.

Iran has already positioned itself in this competition by initiating the construction of the Khaf-Herat railway and planning to launch an additional railway link with Afghanistan through the border province of Nimroz. This indicates that the race to secure a foothold in regional transit networks is intensifying, with multiple countries vying to enhance their strategic and economic influence.

Iran holds a unique position within the International North-South Transport Corridor, managing the entire volume of Russian cargo transported via warm seas to India. Due to its geography, the Islamic Republic is well-positioned to capitalize on the supposed fourth extension of the INSTC, potentially offering an alternative to Afghan transit for trade between Russia and Pakistan.

This scenario poses a significant challenge for Uzbekistan, as it could diminish the prospects of the Kabul Corridor, a project in which Tashkent has placed considerable hopes. Should Iran successfully establish itself as the primary transit route towards Pakistan, Uzbekistan's ambitions to become a key player in the North-South connectivity framework could be undermined, leading to increased competition and geopolitical complexity in the region.

The Afghan government's enthusiasm for opening the Wakhan Corridor, a move that Tehran strongly supports, presents potential risks for most Central Asian states. These countries currently serve as crucial transit hubs connecting major economic centers such as Russia, India, and China.

If direct transport links are established between Afghanistan and China through the Wakhan Valley in the Lesser Pamirs, it could significantly reduce the strategic importance of existing trade routes that pass through Central Asia to connect East and South Asia. Such a development might shift trade flows away from Central Asian countries, potentially diminishing their roles as key nodes in interregional logistics networks and, as well as their economic and geopolitical influence.

Central Asian countries must be well-prepared for potential any shifts in the trans-Afghan transit landscape. To mitigate risks, they should develop a unified and coordinated policy for advancing the southern transit direction. Achieving synergy in the implementation of international transport corridors is crucial, ensuring that the interests of all Central Asian

nations are considered. Such a collaborative approach would not only enhance regional stability but also promote sustainable economic growth by maximizing the collective benefits of improved connectivity and trade opportunities.

# TRANS-AFGHAN RAILWAY: WILL UZBEKISTAN DEVELOP THE KANDAHAR ROUTE?<sup>1</sup>

by **Nargiza Umarova**

**The route through Kandahar can lead to both Pakistan and Iran, an attractive prospect for Tashkent.**

On April 8, 2025, the Russian Ministry of Transport announced the start of the practical implementation of the Trans-Afghan Railway. The ministry's release noted that specialists of both countries will soon begin preparing a feasibility study for the project.

Two routes have been agreed upon: Mazar-i-Sharif-Herat-Dilaram-Kandahar-Chaman and Termez-Naibabad-Logar-Kharlachi. Everything is very clear with the latter. This is the so-called Kabul Corridor (also called Termez-Mazar-i-Sharif-Kabul-Peshawar railway), initiated by Uzbekistan in 2018. Since then, the project has gone through many stages of development. According to the preliminary agreement of the parties, construction of the railway from the border of Uzbekistan to Pakistan was planned to begin in the fall of 2021. However, due to the seizure of power in Afghanistan by the Taliban, the process was postponed.

The Taliban quickly resumed dialogue with Tashkent on the launch of the Kabul Corridor, while simultaneously announcing the construction of the Mazar-i-Sharif-Herat-Kandahar railway (1,468 km), which is presented as the shortest route between Moscow and New Delhi. This would lead to the creation of an alternative rail corridor through the predominantly western Afghan provinces of Farah, Nimroz, Helmand, Kandahar with access to Pakistani ports on the Indian Ocean. In a recent news report by the Russian Ministry of Transport, it's mentioned as Mazar-i-Sharif-Herat-Dilaram-Kandahar-Chaman.

The idea of the Kandahar Corridor is in harmony with the concept of the Torghundi-Herat-Kandahar-Spin Buldak railway route, promoted by Turkmenistan in partnership with Kazakhstan. In September 2024, Ashgabat began laying the first section of the railway from Torghundi station to Herat.

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<sup>1</sup> The Diplomat, April 16, 2025// <https://thediplomat.com/2025/04/trans-afghan-railway-will-uzbekistan-develop-the-kandahar-route/>

Until recently, it appeared that the two Central Asian countries – Uzbekistan and Turkmenistan – were implementing their own transport projects in neighboring Afghanistan. But there are important nuances in this story. The main one is Russia's increased activity on the trans-Afghan track. Over the past year, Moscow has repeatedly expressed interest in constructing both western (from the border of Turkmenistan) and eastern (from the border of Uzbekistan) railways through Afghanistan, seeing in this an opportunity to extend its flagship project, the International North-South Transport Corridor (INSTC), to Pakistan.

In December 2024, it was [reported](#) that Russia would participate in the preparation of the feasibility study for the Trans-Afghan Railway project. However, it was not specified which route would be taken into development.

The partnership with Russia in a transport project which is important for Uzbekistan has raised many questions. In particular, it remains unknown whether the Uzbek-Emirati joint venture “ADL Ulanish” retains its [financial participation](#) in the project. After all, based on the agreement between the governments of Afghanistan and Uzbekistan of February 19, 2024, it was this organization that was supposed to develop the feasibility study for the Kabul Corridor. Later, at the request of Moscow, Russian Railways (JSCo "RZD") joined the financial consortium.

In February 2025, a Taliban delegation led by the Deputy Prime Minister for Economic Affairs Mullah Baradar Akhund visited Tashkent. Following the visit, Baradar [reported](#) on the intentions of Uzbekistan to extend the railway from Hairatan to Herat (a project that Tashkent had put on hold in 2017) and to finance preliminary studies on this route. This dynamic points to the possible involvement of the Uzbek side in the development of the Kandahar Route in addition to the Kabul Corridor.

The route through Kandahar can lead to both Pakistan and Iran. Since 2020, Iran has been [constructing](#) the Chabahar-Zahedan railway line, which it plans to [extend](#) to the border province of Nimroz in Afghanistan, and from there to Dilaram and Kandahar. This will provide Iran with another outlet to Central Asia via Afghanistan in addition to the Khaf-Herat railway and the transit route through Turkmenistan, which is of great interest to India, actively involved in the modernization of Iranian road infrastructure and the deep-water port of Chabahar (detailed analysis here: <https://www.cacianalyst.org/publications/feature-articles/item/13851-what-the-extension-of-transport-corridors-in-afghanistan-means-for-central-asia.html>; <https://www.cacianalyst.org/publications/analytical-articles/item/13841->

Uzbekistan reorients to the Mazar-i-Sharif-Herat-Dilaram-Kandahar-Chaman railway, the Indian route to Central Asia will become even more realistic.

Growing security risks in Pakistan coupled with increased conflict in Afghan-Pakistani relations may also induce Tashkent and its external partners to adjust their preferences on the trans-Afghan track in favor of the Kandahar Corridor. In this regard, it would be quite appropriate to choose a transit route that would lead to the regions of Pakistan closest to the ocean.

Uzbekistan has so far refrained from commenting on the expansion of the Hairatan-Mazar-i-Sharif railway to Herat, and its further extension to Chaman in Pakistan's Balochistan province. It is not known which countries or organizations are being considered as potential funders of a new project, whether the idea of creating a financial consortium within the framework of the implementation of the Trans-Afghan railway corridor through Kabul (the Termez-Naibabad-Logar-Kharlachi route), in which the UAE and Qatar were expected to participate, is still relevant, and whether these countries will be involved in financing the Kandahar Railway Corridor.

# WHAT BENEFITS DOES KAZAKHSTAN EXPECT FROM THE CONSTRUCTION OF THE TRANS-AFGHAN RAILWAY?<sup>1</sup>

*by Nargiza Umarova*

Deputy Prime Minister of Kazakhstan Serik Zhumangarin, who is on an official visit to Kabul, said that Astana will invest \$500 million in the Trans-Afghan railway project. These funds will most likely be used to construction the Torghundi-Herat railway (113 km), which is being designed by the Afghan-German Bakhtar company with the assistance of Indian specialists.

Almost a year ago, Turkmenistan and Kazakhstan agreed to jointly implement the project to construction of the Torghundi-Herat-Kandahar-Spin Buldak Railway Corridor with possible access to Pakistani ports on the Indian Ocean. This route will pass mainly through the western provinces of Afghanistan, from where it could branch off towards Iran and its ocean port of Chabahar.

For Kazakhstan, the Torgundi-Herat railway line is important in terms of extension of the International North-South Transport Corridor (INSTC) to Afghanistan, which will strengthen the country's transit position in interregional transport towards South and West Asia.

In the classical sense, the eastern branch of the INSTC connects Russia with Iran through the railway networks of Kazakhstan and Turkmenistan. The cargo is then transported by sea to India. The proactive policy of the Taliban and Afghanistan's neighbors, especially Uzbekistan, in developing of trans-Afghan trade fills the North-South concept with new content. It's no coincidence that Tashkent's initiative to create the Kabul Corridor (Termez-Mazar-i-Sharif-Kabul-Peshawar railway), as well as the idea of launching an alternative railway corridor through Kandahar, promoted by Ashgabat and Astana, are actively supported by Moscow.

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<sup>1</sup> IAIS Commentary Collection, April 23, 2025 // <https://iais.uz/en/outputnew/what-benefits-does-kazakhstan-expect-from-the-construction-of-the-trans-afghan-railway>

In early April, the Russian side announced its participation in the preparation of the feasibility study for the Trans-Afghan Railway on both routes. The next step is likely to be to join a project financing consortium to gain control of alternative (in addition to Iranian transit) export channels for critical resources, including energy, to the vast markets of South Asia and the Gulf. A similar situation is developing on the TAPI gas pipeline, where Russia and Kazakhstan also intend to act in a strong tandem.

The growth of Russian cargo flows to the southern direction will provide Kazakhstan with a stable income from transit services and facilitate the expansion of trade and economic cooperation with Afghanistan. It is planned to increase mutual trade to \$3 billion. Astana is also interested in the exploration and development of Afghan minerals. The main issue in the implementation of these tasks remains the establishment of reliable transport links with Afghanistan. It is important for the Central Asian countries to achieve mutual coordination based on a common, pragmatic approach.

# AFGHAN AUTHORITIES ACCELERATE PUSH FOR ROAD AND RAIL PROJECTS<sup>1</sup>

by Nargiza Umarova

As the Taliban government pursues an assertive policy to enhance Afghanistan's logistical infrastructure, interest in the country's role as a southern transit hub is gaining momentum across West Asia, facilitating the joint implementation of a wide range of new road and rail projects. Leading the charge is Uzbekistan, which has revived its ambitions through the Termez–Mazar-i-Sharif–Kabul–Peshawar railway—better known as the Kabul Corridor—positioning itself at the forefront of regional integration.

Meanwhile, Turkmenistan, backed by Kazakhstan, is advancing a parallel railway initiative through western Afghanistan to secure more direct access to Pakistan's seaports. In a symbolic move, the foundation for the 22-kilometre Torghundi–Sanobar railway line was laid in September 2024, making a significant step towards reshaping regional connectivity.

The growing engagement between the Central Asian republics and Kabul in the development of transport infrastructure reflects a shared ambition to diversify foreign trade routes and establish more efficient supply chains to access the vast South Asian market. Alongside ongoing projects involving Uzbekistan, Turkmenistan, and Kazakhstan, Afghan authorities have announced plans to construct the Mazar-i-Sharif–Herat–Kandahar railway. This line has the potential to become the shortest trade route between India and Russia, enabling New Delhi to build transport links with Afghanistan and Central Asia while bypassing Pakistan.

Even Iran, which remains the primary conduit linking Central Asia to the warm waters of the Indian Ocean, and, by extension, to global trade, is seeking stronger transport links with Afghanistan. Tehran is planning to launch two railway connections to Afghanistan simultaneously: the Khaf–Herat line in the north and the Zahedan–Zaranj line in the southwest. The railway from Khaf to Herat is nearly complete, and the Taliban intend to extend it to Mazar-i-Sharif, a key Afghan trade hub already connected to the Uzbek-built Hairatan–

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<sup>1</sup> Bourse & Bazaar Foundation, May 5, 2025 // <https://www.bourseandbazaar.org/articles/2025/5/5/afghan-authorities-accelerate-push-for-road-and-rail-projects>

Mazar-i-Sharif railway (launched in 2011) and the planned Kabul Corridor. Integrating these routes could eventually allow Iran to reach the Wakhan Valley in Afghanistan’s Badakhshan province, which is the narrow strip of land separating Afghanistan from China.

Notably, during a Taliban delegation’s two-day visit to Tashkent in February 2025, Uzbek and Afghan authorities agreed to jointly implement the Mazar-i-Sharif-Herat railway route. According to the Afghan Deputy Prime Minister for Economic Affairs, Mullah Abdul Ghani Baradar Akhund, this project would expand Tashkent’s trade with South Asia, Iran, and China, reinforcing the idea that Tehran could utilise the Kabul Corridor to reach the borders of China’s Xinjiang region. Another potential route could see the Zahedan-Zaranj railway extended to Kandahar and Kabul with its subsequent link to the Wakhan Corridor.

In 2020, Iran began constructing the Chabahar–Zahedan railway line, with plans to extend it to Zaranj in Afghanistan’s border province of Nimroz and further onward to Dilaram and Kandahar. Engineering surveys have already been [conducted](#) on the Afghan side for the Zaranj–Kandahar railway, which could offer Tehran an alternative access route to Afghanistan beyond the Herat Road—bringing it one step closer to creating a new overland trade route to China.

Nevertheless, the prospect of reviving the Wakhan Corridor— an outcome eagerly anticipated by Tehran—remains uncertain. In 2024, Afghanistan’s Ministry of Rural Rehabilitation and Development [announced](#) the completion of gravel laying on a 50-kilometre stretch of the road. However, substantial investments are needed to turn the ancient route into a viable commercial transit point. The Taliban are striving for help from China, although Beijing has so far adopted a cautious, wait-and-see approach and is in no rush to open its arms to Afghanistan.

Despite this limited progress, Tehran appears unlikely to back down, particularly as it pursues other ambitious projects. One of these is the proposed Iran–Afghanistan–Tajikistan–Kyrgyzstan–China railway corridor, also known as the Five Nation Road.

Its initial section will be the Khaf–Herat railway, [scheduled](#) to begin full operations later this year. The route would continue through Sheberghan, Mazar-i-Sharif, Khulm, and Kunduz, ultimately reaching the Tajik border at the Sherkhan Bandar crossing. It would then stretch eastwards across Central Asia to Kashgar in western China, spanning an estimated 2,000 kilometres. In this context, the Taliban’s proposed Mazar-i-Sharif–Herat railway becomes a strategic segment of a broader transit route from Iran to China.

The creation of a Five Nation Transit Corridor could also benefit Turkmenistan, which has long pursued a railway link to Tajikistan via Afghanistan through the TAT project. This initiative [emerged](#) in 2013 amid rising tensions between Tashkent and Dushanbe over transit routes and the desire to bypass Uzbekistan.

Turkmenistan [completed](#) the first stage of the TAT railway in 2016, spanning from Atamurat (Kerki) through Ymamnazar to Akina. The Akina–Andkhoy segment [followed](#) in early 2021. However, the Taliban’s return to power in summer 2021 brought work to a halt, as regional actors reassessed the group’s stance on cross-border infrastructure and foreign engagement. Yet contrary to initial concerns, the new Afghan leadership has shown a pragmatic approach to regional connectivity.

In February 2025, Afghanistan and Turkmenistan [agreed](#) to carry out survey and design work for the 55-kilometre Andkhoy–Sheberghan railway line, a project first [announced](#) by the Taliban in 2024. Meanwhile, in July 2024, Tajikistan’s Ministry of Transport and the Korea International Cooperation Agency [signed](#) a protocol to develop a feasibility study for a 51-kilometre Jaloliddini–Balkhi–Panji Poyon railway, linking Tajikistan to the Afghan border. Both developments indicate a resumption of the TAT project, which could raise concerns in Uzbekistan, given its longstanding role as a key transit country for several of its neighbours’ access to global markets.

The development of trans-Afghan logistics infrastructure is also of growing interest to Russia, which sees the new corridors as a means of [extending](#) its flagship International North–South Transport Corridor (INSTC) to Pakistan.

A clear indication of this was the visit of a Russian delegation led by Security Council Secretary Sergei Shoigu to Kabul on 25 November 2024, during which the construction of the Trans-Afghan Railway was discussed. Following talks with the Taliban, Russian Deputy Prime Minister Alexei Overchuk [stated](#) that the Russian Federation considers this project as an integral component of the INSTC.

The Russian Ministry of Transport later announced that it would collaborate with Uzbekistan to prepare a feasibility study for a railway through Afghanistan, based on two agreed routes: Mazar-i-Sharif–Herat–Dilaram–Kandahar–Chaman and Termez–Naibabad–Logar–Kharlachi. But this announcement was not confirmed by Uzbekistan Railways.

Russian involvement in constructing both the western and eastern Afghan railway routes—starting from the borders with Turkmenistan and Uzbekistan, respectively—would

allow Ashgabat and Tashkent to secure a share of cargo flows between Northern Eurasia to South Asia. Increased competition along these routes is likely to drive down the cost of transit transport over time.

The opening of new trade routes through Afghanistan presents significant opportunities for realising Central Asia's economic and transport-transit potential. Several key factors should be considered when assessing further developments in this area.

One consideration is the potential reorientation of Uzbekistan towards the western Trans-Afghan railway route. The relative cost-effectiveness of the Kandahar Corridor, compared to the railway via Kabul, could serve as a catalyst for such a shift. Although the Mazar-i-Sharif-Herat-Kandahar-Chaman route (1,468 km) is longer than the Kabul Corridor (647 km), it offers advantages in terms of terrain and security. Additionally, the route can branch towards Iran through the border province of Nimroz in south-western Afghanistan, providing a valuable strategic link for future transport corridors.

Another important factor is the growing security risks in Pakistan, coupled with increasing tensions in Afghan-Pakistani relations. These dynamics may prompt Tashkent and its external partners to reconsider their preferences on the trans-Afghan track, favouring the Kandahar Corridor instead. In this context, prioritising a transit route that connects to the southern regions of Pakistan—those closest to the ocean—would be more appropriate.

Given the growing significance of Afghan transit in transregional logistics, Central Asian countries will need to balance the interests of all stakeholders to prevent the emergence of intensified geopolitical rivalries along these evolving trade corridors. Harmonisation of the trans-Afghan routes currently under development appears to be both the most likely and most favourable scenario for the future. In such a case, the key stakeholders, particularly Uzbekistan, Turkmenistan and Kazakhstan, could pool their resources to establish a unified transregional railway corridor through Afghanistan.

This collaborative approach would enhance the prospects for attracting external investment and accelerating project implementation. Moreover, a consolidated approach is vital for strengthening the region's role in shaping the emerging architecture of trans-Afghan connectivity. If done successfully, Afghanistan could gain a genuine opportunity to position itself as a new transit hub at the heart of Eurasia.

# WHY DOES RUSSIA NEED A TRANS-CASPIAN ROUTE TO AFGHANISTAN<sup>1</sup>

by **Nargiza Umarova**

At a joint business forum in Kazan (Republic of Tatarstan, Russian Federation), Russia and Afghanistan considered the prospects for developing the Russia-Kazakhstan-Uzbekistan-Afghanistan-Pakistan and Russia-Caspian Sea-Turkmenistan-Afghanistan multimodal transit corridors.

This development brings clarity to the understanding of Moscow's long-term vision for shaping Afghanistan's transportation architecture. It is noteworthy that along with the overland route through Kazakhstan and Uzbekistan, the Russian side has begun to openly discuss the possibility of connecting to Afghanistan via the Caspian Sea using Turkmenistan's port and railroad infrastructure. This approach signals Russia's desire to diversify its supply routes to South Asia in order to pre-empt the risk of excessive dependence on one or another transit country.

The idea to establish multimodal transportation along the North-South axis through Afghanistan was initiated by Uzbekistan. In 2022, Tashkent proposed to launch an interregional route Belarus-Russia-Kazakhstan-Uzbekistan-Afghanistan-Pakistan with a length of 5532 kilometers. A year later, the parties signed a memorandum on its implementation. Since then, Russia has been noticeably active on the trans-Afghan track and has already announced its participation in the preparation of a feasibility study of the Trans-Afghan railroad project.

As is known, Uzbekistan is promoting the concept of the Kabul corridor, which involves laying railroad tracks from Mazar-e-Sharif (Afghanistan) to Peshawar (Pakistan). The work was planned to start in the fall of 2021. However, due to an unexpected change of power in Afghanistan, the process was suspended and then resumed again. Meanwhile, in 2024, Turkmenistan in partnership with Kazakhstan presented an alternative version of the Trans-Afghan railroad along the Torghundi-Herat-Kandahar-Spin-Buldak route with access to

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<sup>1</sup> IAIS Commentary Collection, May 26, 2025 // <https://iais.uz/en/outputnew/why-does-russia-need-a-trans-caspian-route-to-afghanistan>

Pakistani ports in the Indian Ocean. Russia appears to be interested in the operation of both the Kabul and Kandahar corridors.

In September 2024, Turkmenistan started laying the first section of the Torghundi-Herat railroad (115 km), which is planned to be extended to the Pakistani border via Kandahar. Part of the project's \$500 million cost will be borne by Kazakhstan.

Following their February visit to Tashkent, the Taliban said they had reached an agreement with the Uzbek side on the construction of the Mazar-e-Sharif-Herat railroad, although Uzbekistan's specialized agency did not confirm this information. Here we should also emphasize that one of the two routes, which, judging by the reports of the Russian Ministry of Transport, was agreed upon for the preparation of the feasibility study of the Trans-Afghan railroad, starts from the city of Mazar-e-Sharif, connecting Afghanistan's Herat, Dilaram, Kandahar with the border town of Chaman in Pakistan. It follows that the Taliban government intends to turn Herat into the country's main transit hub, which would give major shippers such as Russia the opportunity to connect to different branches of the Trans-Afghan Railway – west via Kandahar or east via Kabul. Connecting the routes would probably allow Afghanistan to attract more transit cargo, which, in addition to economic benefits, would bring the local government considerable geopolitical dividends. However, this plan may cause a conflict of interests for Central Asian states involved in trans-Afghan communications.

A trade route across the Caspian Sea to Afghanistan is sure to irritate Tashkent, which is making great efforts to build the Termez-Mazar-e-Sharif-Kabul-Peshawar railroad, which is supposed to complete the process of creating a direct rail link between East Asia, Eurasia and the Indian peninsula. The efficiency of any transportation corridor depends on the freight base. If the Russia-Caspian Sea-Turkmenistan-Afghanistan multimodal route is launched, a significant volume of supplies from north to south may be reoriented to the sea route due to its low cost and the enormous cargo capacity of sea vessels. Regardless of which transport and through which Central Asian country transit flows to Afghanistan will be directed, the Kabul corridor will have to compete for their transportation, which will be a serious challenge for the region.

# COULD TRANS-AFGHAN TRANSPORT ROUTES SPLIT CENTRAL ASIA?<sup>1</sup>

by Nargiza Umarova

*The fourth session of the India–Central Asia Dialogue at the level of foreign ministers convened in New Delhi on 6 June 2025. The concluding communiqué underscored the significance of Iran’s Chabahar Port in advancing trade connectivity between the Central Asian republics and India, and beyond.*

*The Indo-Iranian Chabahar initiative competes with the port of Gwadar, a pivotal component of the China–Pakistan Economic Corridor (CPEC), which envisages the integration of Central Asia through the development of a trans-Afghan railway. Concurrently, Russia is pursuing its distinct agenda by engaging with the Taliban to extend the International North–South Transport Corridor (INSTC) into Afghanistan. Under such conditions, the Central Asian republics face the risk of becoming entangled in a cycle of great power competition, thereby endangering their own national interests.*

**BACKGROUND:** Since 2020, Uzbekistan has engaged in dialogue with India and Iran regarding the joint utilization of the deep-water port of Chabahar, which provides direct access to the Indian Ocean. Situated in southeastern Iran, the port constitutes a critical component of Tashkent’s strategy to develop southern transit corridors and diversify freight transportation routes. Chabahar functions as a commercial gateway to Central Asia and Afghanistan, affording major global economies—especially India—access to key regional resources. This underlies New Delhi’s commitment to upgrading the Shahid Beheshti terminal in Chabahar and enhancing the surrounding transport infrastructure.

Moreover, transit through Iran reduces the cost and duration of Indian cargo shipments to and from Central Asia by nearly one-third relative to maritime routes via Europe or China. India’s objective extends beyond securing efficient and affordable access to uranium, oil, coal, and other raw materials from Central Asia; it also involves circumventing its principal rival, Pakistan.

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<sup>1</sup> The Central Asia-Caucasus Analyst, June 25, 2025 // <https://www.cacianalyst.org/publications/analytical-articles/item/13876-could-trans-afghan-transport-routes-split-central-asia?.html>

The Indian transit corridor to Central Asia, originating at Chabahar, may proceed through both Iran and Afghanistan. In 2020, Iran commenced construction of the 628-kilometer Chabahar–Zahedan railway line, with financial assistance from India. Work on this segment is nearing completion. The route is projected to continue toward the Turkmenistan border, traversing the northern Iranian cities of Mashhad and Serakhs. En route, the Chabahar–Zahedan–Mashhad railway will diverge toward the city of Khaf, where the inaugural cross-border rail link between Iran and Afghanistan begins.

The construction of the 225-kilometer railway linking Khaf to Herat in Afghanistan is also approaching completion. Its designed capacity is estimated at up to three million tons annually, with transit cargo expected to comprise more than half of this volume. Consequently, the Khaf–Herat railway is poised to be integrated into a broader China-led transport initiative connecting East and West through Central Asia, Afghanistan, and Iran. Owing to its direct linkage with Afghanistan, Uzbekistan stands to benefit from this configuration by enhancing its own transit capacity. The Taliban administration seeks comparable advantages for Afghanistan and is actively encouraging Tashkent to extend the railway from Mazar-i-Sharif to Herat. While such an extension would grant Uzbekistan additional access to Chabahar by circumventing Turkmenistan, it could also redirect China–Europe–China transit cargo toward other neighboring states bordering Afghanistan.

**IMPLICATIONS:** For several years, Iran has actively pursued the realization of the China–Kyrgyzstan–Tajikistan–Afghanistan–Iran railway corridor, commonly referred to as the “Five Nation Road.” The Afghan segment of this 2,100-kilometre overland route will primarily comprise the railway currently under construction between Mazar-i-Sharif and Herat. From Mazar-i-Sharif, the transportation network would require only an extension to Sherkhan Bandar in Kunduz Province to establish a connection with the Tajik border. This development would facilitate Tajikistan’s access to Iran through Afghan territory, thereby definitely weakening Uzbekistan’s competitive position in regional transit logistics.

The Taliban regard the Mazar-i-Sharif–Herat railway as an integral element of a broader initiative aimed at establishing a Trans-Afghan corridor extending through Kandahar to Pakistan, analogous to Uzbekistan’s proposed Kabul Corridor. In 2023, the Afghan authorities announced plans to construct the Mazar-i-Sharif–Herat–Kandahar railway, which, according to media sources, is projected to provide the shortest overland route between

Moscow and New Delhi via Afghanistan. Russia, Turkmenistan, Kazakhstan, and even Turkey have been invited to invest in the venture.

The attractiveness of the Kandahar Corridor lies in its capacity to extend toward both Iran and Pakistan. Ashgabat and Astana are already advancing a new transit route from the Torghundi railway station, located at the Afghan–Turkmen border, toward Pakistan, traversing western Afghanistan. Recently, the Russian Ministry of Transport announced the initiation of a feasibility study for the Trans-Afghan railway, covering the Mazar-i-Sharif–Herat–Kandahar–Chaman route.

Without reaching Kandahar in the city of Delaram, both lines could be redirected westward and linked to Iran’s Zahedan via Zaranj in Nimroz Province, ultimately reaching the port of Chabahar.

Consequently, the Central Asian states will gain an additional opportunity to access the warm waters of the Indian Ocean. However, this scenario presents significant implications for Uzbekistan. Foremost, the advancement of the Kandahar Corridor—regardless of whether it extends toward Iran—raises concerns regarding the viability of the Trans-Afghan Railway via Kabul, which Tashkent has identified as a core interest. The simultaneous operation of both routes will inevitably result in competition for transit cargo, thereby impacting their overall profitability. Uzbekistan is will unlikely be able to impede the construction of the Mazar-i-Sharif–Herat railway, as the initiative partially aligns with the interests of Russia, India, Iran, and China. Under such circumstances, preserving the relevance of the Kabul Corridor—particularly amid funding constraints—becomes exceedingly challenging.

Secondly, the construction of the Zaranj–Delaram railway line will establish conditions conducive to the redistribution of cargo flows transiting Afghanistan toward South Asia and beyond, in favor of Chabahar. This development represents a direct challenge to the China–Pakistan Economic Corridor, the most costly and prominent flagship project of the Belt and Road Initiative, which prioritizes the expansion of the Gwadar port on Pakistan’s Arabian Sea coast. Enhancing Chabahar’s transit capacity through the creation of a comprehensive network of rail and roads linking the port to neighboring countries and regions within Iran’s periphery may diminish the significance of the Kabul Corridor as a land bridge between the poles of continental Asia.

Should the Kandahar route be developed and extended into Iran, Gwadar will be compelled to share prospective cargo flows with Chabahar, thereby intensifying the rivalry

between New Delhi and Beijing. Russia must also be considered, as it views the Trans-Afghan Railway as a means to extend its flagship International North–South Transport Corridor (INSTC) into Afghanistan. Preliminary estimates place the volume of Russian cargo on the Trans-Afghan route at between 8 and 15 million tons annually. In light of escalating tensions between Kabul and Islamabad, as well as the generally unstable security climate in Pakistan—particularly in the provinces of Khyber Pakhtunkhwa and Balochistan, through which two proposed railway branches from Central Asia to Indian Ocean ports are planned—Russia may opt to reroute a portion of its exports to Chabahar via Afghanistan. Over time, this shift could also influence freight transit patterns from Northern Europe to India.

Nevertheless, the ongoing escalation of armed conflict between Iran and Israel introduces significant uncertainty regarding the feasibility of such transport configurations. A protracted period of hostilities, accompanied by potential political destabilization within Iran, will unavoidably impact the reliability of established logistics networks in West Asia, potentially necessitating their complete reconfiguration. Under these conditions, both the trans-Afghan corridors leading to Iran and the Indian access route to Central Asia via Afghanistan will be placed at considerable risk. This situation will undoubtedly compel stakeholders to revise their strategies concerning the Chabahar project and to place greater emphasis on leveraging Pakistan’s transit capabilities.

**CONCLUSIONS:** Uzbekistan’s proactive engagement in the development of a network of trans-Afghan trade routes is anticipated to yield both economic and political advantages by enhancing its national and regional transit capacity. However, realizing these outcomes will require Tashkent to navigate carefully among the interests of global and regional powers, whose influence may significantly shape the implementation of specific transport initiatives within Afghanistan.

For the Central Asian states, maintaining diversified access to the southern ports of Iran and Pakistan is advantageous, provided that intra-regional competition is avoided, as such rivalry could undermine their collective competitiveness along the trans-Afghan corridor. Accordingly, it is essential to implement a coordinated policy aimed at identifying and advancing mutually beneficial transport routes through Afghanistan. Reaching consensus on a unified negotiating stance in engagements with the Afghan leadership is vital to mitigate the risk of the Taliban enacting externally influenced political decisions that may contradict the interests of Central Asian states.

# COULD THE LAPIS LAZULI CORRIDOR HINDER UZBEKISTAN'S TRANSIT PROSPECTS?<sup>1</sup>

*by Nargiza Umarova*

Azerbaijan is strengthening its political and economic ties with the Taliban government by playing an active role in creating and developing promising transport routes to South Asia. At the forefront is the Lapis Lazuli Corridor, launched in 2018 through a joint initiative of Afghanistan, Azerbaijan, Turkey, Georgia and Turkmenistan, similar to the ancient route of the Great Silk Road.

On July 2, 2025, on the sidelines of the Economic Cooperation Organization summit in Khankendi, Azerbaijan, Abdul Ghani Baradar, Afghanistan's Deputy Prime Minister for Economic Affairs, met with Azerbaijani Prime Minister Ali Asadov. They emphasized Baku's readiness to increase export and import volumes with Afghanistan. They also discussed prospects for developing deliveries in the South Asia-Caucasus-Europe direction. This would involve expanding the Lapis Lazuli Corridor to Pakistan and India, enabling participants to attract transit cargo from India and the EU. Trade between these two economic giants has grown steadily and reached \$137 billion in 2024.

However, the transit corridor from Europe to India via the South Caucasus, Turkmenistan and Afghanistan could threaten the viability of the Belarus-Russia-Kazakhstan-Uzbekistan-Afghanistan-Pakistan-Indian Ocean ports multimodal corridor suggested by Uzbekistan. This initiative is linked to the Trans-Afghan Railway project (also known as the Kabul Corridor), which would run from Termez to Naibabad, Maidanshahr, Logar and Kharlachi, with a projected carrying capacity of up to 20 million tons per year. If the Lapis Lazuli Corridor is activated in an expanded version, Tashkent risks losing these flows, as the cargo will bypass the country.

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<sup>1</sup> IAIS Commentary Collection, September 18, 2025 // <https://iais.uz/en/outputnew/could-the-lapis-lazuli-corridor-hinder-uzbekistans-transit-prospects>

It is highly probable that the Lapis Lazuli Corridor will be integrated with the western Trans-Afghan Railway along the Torghundi-Herat-Kandahar-Spin Buldak route. This route is being promoted by Ashgabat and Astana as an alternative to the Kabul Corridor, which would also conflict with Uzbekistan's interests.

Russia may be seriously interested in the Lapis Lazuli Corridor, particularly given that Moscow has already announced its intention to establish a connection with Afghanistan via the Caspian Sea, making use of Turkmenistan's port and railway infrastructure.

To maintain and increase its competitive advantages in the trans-Eurasian and trans-Afghan transport sectors, Uzbekistan must strengthen its coordination with neighbouring partner countries, including Azerbaijan, regarding transport and transit issues. Consideration should be given to extending the Middle Corridor to Afghanistan via Uzbekistan, with the possibility of continuing the route to Pakistan through the Kabul Corridor.

# ON THE QUESTION OF THE PROSPECTS FOR DEVELOPING THE SOUTHERN TRANSIT CORRIDOR THROUGH CENTRAL ASIA<sup>1</sup>

## (book chapter)

*by Nargiza Umarova*

The foreign policy of the Central Asian countries regarding transport communications focuses on streamlining processes and lowering expenses associated with international freight transportation. This approach aims not only to facilitate smoother cross-border trade but also to enhance the region's overall transit potential. In this regard, Kazakhstan and Uzbekistan are playing pivotal roles due to their strategic geographic locations and well-developed infrastructure. Both countries are actively driving initiatives to diversify existing trade routes and establish new transit corridors, thereby broadening the range of options for transporting goods through the region. Their efforts significantly contribute to strengthening Central Asia's position in global logistics and expanding its role as a key transit hub between East and West.

The advancement of the southern transit route is considered a top priority because it aims to establish reliable and efficient transport corridors linking key global economies such as China, India, and the European Union. Special emphasis is placed on maximizing the transit capabilities of Iran and Afghanistan, as these countries offer landlocked Central Asia not only access to open sea routes but also entry to growing and lucrative markets.

Two strategically important projects deserve special attention for their potential to dramatically reshape the transport and logistics framework of Central Asia, positioning the region as a central hub for trans-Eurasian transit.

In December 2024, construction began on a railway linking China, Kyrgyzstan, and Uzbekistan along the Kashgar – Torugart – Makmal – Jalal-Abad – Andijan route, with a total length of 532.5 km. Work is also underway on the construction of the China – Tajikistan –

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<sup>1</sup> “Central Asia – Afghanistan Cooperation: Challenges and Opportunities.” Joint report of The Kazakhstan Institute for Strategic Studies under the President of the Republic of Kazakhstan and the Institute for Advanced International Studies pf the University of World Economy and Diplomacy, October, 2025 // <https://insightscentral.asia/publications/9a3de765-42d8-4f26-a93e-351a06e71a25>

Uzbekistan highway. Both transport arteries have the potential to be extended to the Caspian Sea, providing access to the South Caucasus and Turkey in a manner similar to the Middle Corridor, to Iran with access to Turkey and Europe via the Southern Railway Corridor, or to the Persian Gulf, as well as to Afghanistan with access to South Asia. Such a combination of routes will enable the Central Asian states to significantly increase the export of transport services, thereby improving their economic situation.

However, it should be emphasized that following the construction of the China – Kyrgyzstan – Uzbekistan railway and its extension to the Turkmenbashi port on the Caspian Sea, a substantial reorientation of freight flows from the China – Kazakhstan – Caspian Sea ports – Middle Corridor route toward Europe to the southern branch of the Trans-Caspian International Transport Route, passing through Kyrgyzstan, Tajikistan, Uzbekistan, and Turkmenistan, is not expected. It follows that the improvement of the Middle Corridor is necessary only for the two Central Asian countries with direct access to the Caspian Sea – Kazakhstan and Turkmenistan – as the shortest and most convenient route for mutual trade with the EU. For the other republics of the region, it will serve as one of several alternative transport routes to external markets.

For Uzbekistan, it is far more efficient to establish transport links with Europe via Iran, as this lays the foundation for the full realization of the country's transit potential. The launch of the China – Kyrgyzstan –Uzbekistan railway and its further integration with the Iranian railway network within the framework of a unified SCO transport space will shorten the trade route between East Asia and Europe by 900 kilometers and reduce cargo delivery time by 7-8 days. As a result, the Southern Railway Corridor will become the shortest multimodal route connecting two economically developed macroregions. Its carrying capacity could increase from the current 1.8 million tons per year to 10 million tons per year. Transit routes from China via Iran are currently in the process of being established. In particular, work is underway to create the China – Kazakhstan – Uzbekistan – Turkmenistan – Iran – Turkey – EU railway corridor, which leverages Kazakhstan's transit potential. Active steps are also being taken to develop the China – Kyrgyzstan – Uzbekistan – Turkmenistan – Iran – Turkey – EU multimodal route, passing through Kyrgyzstan. Once the international highway from China to the Uzbekistan border via Tajikistan is completed, another efficient land route from China to Europe will be available. All Central Asian states are involved in these processes, allowing them to consolidate their efforts based on shared interests.

A similar multiplier effect is expected through the implementation of Tashkent's second strategic initiative – the construction of the Trans-Afghan (Kabul) railway corridor along the Termez – Naybabod – Maidanshahr – Logar – Kharlachi route, intended to serve as a transport bridge between Europe, China, and South Asia.

Preliminary estimates suggest that by 2030, the potential cargo flow along this new route could reach up to 22 million tons per year, rising to 34 million tons per year by 2040. The majority of the cargo base will be formed through transit. The integration of the Trans-Afghan corridor with the high-altitude China – Kyrgyzstan – Uzbekistan railway, as well as with the Northern Corridor, could allow the Central Asian republics to attract an additional 5 to 20 million tons of transit cargo per year, while also providing them with direct access to ports on the Indian Ocean, which they urgently need. Progressive work is underway in this direction.

In 2023, at Uzbekistan's initiative, the process of forming the Belarus – Russia – Kazakhstan – Uzbekistan–Afghanistan – Pakistan – Indian Ocean ports multimodal route was launched, effectively realizing the idea of integrating the Northern and Trans-Afghan corridors. The new route, 5,532 km in length, will allow goods to be transported from northern Eurasia to South Asia in 20 days – three times faster than by sea.

Central Asian states have not yet developed a consolidated position regarding the development of Trans-Afghan transport communications. Their attention is divided between two potentially competing projects. Since 2018, Uzbekistan has actively promoted the concept of the Kabul corridor. In 2021, Uzbekistan, Afghanistan, and Pakistan adopted a roadmap for the construction of the Trans-Afghan railway, with a preliminary cost of \$6.9 billion. In 2023, a project office was opened in Tashkent to promote digital transport corridors, with branches in Kabul and Islamabad. On 17 July 2025, the parties [signed](#) a framework intergovernmental agreement in Kabul on the development of a feasibility study for the project.

Meanwhile, in July 2024, Turkmenistan and Kazakhstan [agreed](#) on the joint promotion of another Trans-Afghan railway project along the Torgundi – Herat – Kandahar – Spin Buldak route, which will pass through the western provinces of Afghanistan.

A month later, Turkmen–Afghan negotiations took place in Kabul, where the delegation of “Turkmendemiryollary” [expressed its readiness](#) to finance the construction of the railway from Torgundi station (Afghanistan) to Herat. On 11 September 2024, Ashgabat [began laying](#) the first section of the announced project – the 22-kilometer Torgundi – Sanobar railway line.

On its part, Kazakhstan announced the allocation of \$500 million for the construction of the Torgundi – Herat railway, planned as the first section of the western branch of the Trans-Afghan railway. The respective agreement was signed in Kabul on July 11, 2025, during a meeting between Kazakhstan's Deputy Prime Minister and Foreign Minister Murat Nurtleu and Mullah Abdul Ghani Baradar Akhund, Deputy Chairman of the Council of Ministers of Afghanistan for Economic Affairs. As Mullah Baradar stated, this railway project would enhance Afghanistan's transit capabilities and contribute to broader regional economic integration. However, the technical and economic parameters, budget and potential investors of the planned western route through the western Afghan provinces are still unknown.

The Torgundi – Herat trade route could be expanded in three directions simultaneously: toward the borders of Pakistan, Iran, and the Caspian Sea. The latter aligns with the concept of reviving the ancient Lapis Lazuli Corridor, which will connect Herat with Ashgabat, continue to the Caspian port of Turkmenbashi with access to the Baku International Sea Port, and then through Georgia to Ankara and Istanbul. This combination will enable Afghanistan to establish fast and reliable connections with Europe, while simultaneously reducing transit dependence on Iran, Pakistan, and, to a certain extent, Uzbekistan.

The Lapis Lazuli Corridor began operating in 2018, modeled on the ancient route of the Great Silk Road. Recently, Azerbaijan has been actively strengthening its political and economic ties with the Taliban government, engaging in the creation and development of promising trade and transport routes toward South Asia.

On 2 July 2025, on the sidelines of the Organization of Economic Cooperation summit in Khankendi, Azerbaijan, Afghan Deputy Prime Minister for Economic Affairs Abdul Ghani Baradar met with Azerbaijani Prime Minister Ali Asadov, during which Baku's [readiness](#) to increase trade with Afghanistan was emphasized.

The potential for developing supply flows along the South Asia –Caucasus – Europe route was also considered. In effect, this involves expanding the Lapis Lazuli Corridor to Pakistan and India, which would allow the route participants to capture transit cargo from India and the EU. At the same time, this creates a potential risk for the viability of the Belarus – Russia – Kazakhstan – Uzbekistan – Afghanistan – Pakistan – Indian Ocean ports multimodal corridor, which could result in Uzbekistan losing transit flows.

There is a high probability of integrating the Lapis Lazuli Corridor with the western Trans-Afghan railway along the Torgundi – Herat – Kandahar – Spin Buldak route, promoted

by Ashgabat and Astana as an alternative to the Kabul corridor, which would also conflict with Uzbekistan's interests.

In terms of length, the Kandahar route from the Turkmenistan border to Pakistan (926 km) is longer than the Kabul corridor (647 km); however, it could potentially branch off toward Iran from the western Afghan province of Nimroz, giving the future transport artery an important advantage. Nevertheless, neither Ashgabat nor Astana has committed to this turn toward Iran. Based on official rhetoric, their main goal is access to the Pakistani market, and through it, by sea, to India and the countries of the Persian Gulf. Moreover, Kazakhstan and Turkmenistan already have a railway connection with Iran, launched in 2014.

Turkmenistan, as the initiator of the alternative Trans-Afghan corridor, is already concerned about its utilization. The choice of Kazakhstan as a partner, bordering Russia, which is highly interested in delivering its products, especially hydrocarbon resources, to the vast South Asian market, is not accidental. Since 2000, Russia, in partnership with India and Iran, has been implementing the International North–South Transport Corridor, which has three transit routes: western, through Azerbaijan; trans-Caspian, across the Caspian Sea; and eastern, through Kazakhstan and Turkmenistan. [Reports](#) indicate that a fourth route is expected to emerge, which, from Moscow's perspective, should be the Trans-Afghan railway.

Just a year ago, the Afghan authorities [called](#) on Russia and Kazakhstan to join the implementation of this project. The proposal was accepted, with each side having its own motives. Astana supports the construction of both railways because it provides flexibility in choosing a transit country for connection with Afghanistan, and, in the presence of competition, allows for favorable tariff conditions. A second benefit for Kazakhstan will be its role as a link between Russia and the Central Asian republics bordering Afghanistan. It is precisely this factor that prompted Ashgabat to pursue a long-term partnership with Astana on the Trans-Afghan track.

Thus, the proactive policy of the current Afghan government to expand Afghanistan's transit capabilities on the one hand, and the prioritization of the southern transit route by some Central Asian countries on the other, have brought the region's relations with Kabul to a qualitatively new level. Five Central Asian states are rapidly developing trade, economic, and investment cooperation with Afghanistan. Uzbekistan is implementing a number of joint projects in partnership with the Taliban, the key one being the construction of the railway from Termez to Kharlachi. Over the past year, Turkmenistan and Kazakhstan have also stepped up their activity, proposing their own variant of the Trans-Afghan corridor with

access to Pakistani ports. Both projects will account for potential freight flows from Northern Eurasia to South Asia, thereby providing a stimulus for the region's economic development.

# EXTENDING THE MIDDLE CORRIDOR TO AFGHANISTAN: IMPLICATIONS FOR UZBEKISTAN<sup>1</sup>

*by Nargiza Umarova*

*Azerbaijan is strengthening its political and economic ties with the Taliban government by playing an active role in creating and developing promising transport routes to South Asia. At the forefront is the Lapis Lazuli Corridor, launched in 2018 through a joint initiative of Afghanistan, Azerbaijan, Turkey, Georgia and Turkmenistan, similar to the ancient route of the Great Silk Road. The possibility of extending the corridor to South Asia is being considered, which would have geo-economic and geopolitical implications for Uzbekistan.*

**BACKGROUND:** The \$2 billion [Lapis Lazuli Agreement](#) was signed by Afghanistan, Azerbaijan, Georgia, Turkey and Turkmenistan on 15 November 2017. The route runs from the Afghan cities of Aqina in Faryab Province and Torghundi in Herat Province, through the Caspian Sea ports of Turkmenbashi and Baku, and the Georgian Black Sea ports of Poti or Batumi, to Istanbul or Kars in Turkey, with further access to the European transport system.

The first test shipment along the Lapis Lazuli logistics chain was carried out in 2018. In January 2021, Turkmenistan, Azerbaijan and Afghanistan [signed](#) a trilateral roadmap to develop this route. However, implementation of the document was suspended due to the Taliban's seizure of power in Kabul in August 2021.

Against the backdrop of pragmatic interactions between Central Asian states — particularly Uzbekistan — and the current Afghan leadership, Azerbaijan is also seeking to strengthen its position in Afghanistan as a partner in trade, the economy, transport, and logistics.

Baku's main priority is the Middle Corridor project, a vital logistics link between China and Europe. The Lapis Lazuli Corridor essentially extends the Middle Corridor to Afghanistan.

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<sup>1</sup> The Central Asia-Caucasus Analyst, October 16, 2025 // <https://www.cacianalyst.org/publications/analytical-articles/item/13897-extending-the-middle-corridor-to-afghanistan-implications-for-uzbekistan.html>

This enables Kabul to take part in trans-Caspian shipping and to redirect some of its export cargo bound for the European market from Pakistan or Iran, to the South Caucasus and Turkey.

In 2024, Afghanistan's total trade with the EU was approximately US\$ 42 million, which is 15.9 percent higher than the previous year's figure. Experts predict that this growth trend will continue. Meanwhile, Azerbaijan is attempting to accelerate these processes by adopting a proactive approach to its relations with the Taliban.

On July 2, 2025, on the sidelines of the Economic Cooperation Organization summit in Khankendi, Azerbaijan, Abdul Ghani Baradar, Afghanistan's Deputy Prime Minister for Economic Affairs, [met](#) with Azerbaijani Prime Minister Ali Asadov. They emphasized Baku's readiness to increase export and import volumes with Afghanistan. The Afghan delegation visited the Baku International Seaport, where they discussed expanding the geography of freight transport along the South Asia-Caucasus-Europe route and integrating Afghanistan into the Middle Corridor.

Azerbaijan and Turkmenistan have made significant efforts to develop the infrastructure of the Lapis Lazuli Corridor. Azerbaijan has invested approximately US\$ 1 billion in two vital elements of the project: the Alat Port in Baku and the Baku-Tbilisi-Kars railway. Meanwhile, Turkmenistan [constructed](#) the Atamurat (Kerki)-Ymamnazar-Aqina railway in 2016, and [connected](#) the Afghan cities of Aqina and Andkhoy by rail in 2021. The Caspian port of Turkmenbashi is also being modernized to increase its capacity. In order to generate economic returns on their investments and reap the long-term benefits of transport service exports, it is crucial for Baku, Ashgabat and other stakeholders along the route to maximize its utilization. This justifies the idea of extending the Lapis Lazuli Corridor to Pakistan and India, which would run contrary to Uzbekistan's interests.

**IMPLICATIONS:** It is assumed that the transport corridor from Europe to India via the South Caucasus, Turkmenistan and Afghanistan will become an alternative to Tashkent's strategic plan for connecting Eastern Europe with the Indian subcontinent. This plan involves linking the Trans-Afghan Railway (Kabul Corridor) with the Northern Railway Corridor through Russia. To this end, Uzbekistan has [initiated](#) the formation of the Belarus-Russia-Kazakhstan-Uzbekistan-Afghanistan-Pakistan-Indian Ocean ports transit route, which is set to launch in multimodal format soon.

The main benchmark for calculating the Kabul Corridor's economic efficiency and feasibility is India's growing potential for trade with Central Asian countries, the EU, China and Russia.

In the 2024 fiscal year, India's trade turnover with the EU exceeded US\$ 137 billion, with China US\$ 118 billion, with Russia US\$ 70 billion, and with Central Asian countries US\$ 1.7 billion. The majority of Indian goods are delivered to promising markets by sea, which incurs high financial and time costs. The integration of India and Pakistan's transport space into the Eurasian road network is expected to stimulate land transportation along the South Asia-Europe axis. This shift holds great potential for the Kabul Corridor, with a projected annual cargo volume of up to [22 million tons](#), most of which will be in transit.

However, the extension of the Middle Corridor to Afghanistan and the development of further access to Pakistan and India will redistribute the flow of cargo from South Asian countries to Europe in favor of Turkmenistan and Azerbaijan, who are connected by the Caspian Sea. In turn, this risks diminishing Uzbekistan's exclusive role as a trans-Eurasian transport link.

In theory, the Lapis Lazuli Corridor could be extended to Pakistan by constructing a railway line from Torghundi station on the Afghan-Turkmen border to Naibabad station, which marks the beginning of the Afghan section of the Kabul Corridor. Although this would exclude Uzbekistan from the India-EU supply chain, it would enable the Kabul Corridor to attract additional cargo from the South Caucasus and Turkmenistan. However, this advantage would not offset Uzbekistan's loss of transit flows from the larger economic centers of Eurasia.

Connecting the Lapis Lazuli and Kabul corridors would motivate constructing the Herat-Mazar-i-Sharif railway, which would breathe new life into the long-standing Five Nations Railway Corridor project, running through China, Kyrgyzstan, Tajikistan, Afghanistan and Iran. The Five Nations Route bypasses Uzbekistan, significantly reducing the distance between East and West. This will probably diminish the importance of the Southern Railway Corridor, which runs through Central Asia, Iran, and Turkey, as well as the China-Kyrgyzstan-Uzbekistan railway, which is intended to be an important component of this route.

At the same time, constructing the Herat-Mazar-i-Sharif railway could undermine the Lapis Lazuli Corridor's competitive advantage by increasing Iranian transit. Iran already has rail access to northern Afghanistan via the Khaf-Herat route, which is used to deliver Afghan cargo to Europe. Extending the Khaf-Herat railway to Naibabad station near Mazar-i-Sharif

and connecting it to the Kabul Corridor would enable Iran to divert potential cargo traffic from India and Pakistan to Turkey and Europe via itself, thereby depriving Central Asian and South Caucasian countries of transit benefits. Consequently, there is a possibility that the Lapis Lazuli Corridor could be extended to South Asia, bypassing Kabul and instead passing through Kandahar. This would stimulate the development of the western Trans-Afghan Railway along the Torghundi-Herat-Kandahar-Spin Buldak route. Turkmenistan and Kazakhstan [promote](#) the project as an alternative to the Kabul Corridor.

Russia should be considered a potential stakeholder in the extension of the Lapis Lazuli Corridor along any of the trans-Afghan routes. Moscow has already [announced](#) plans to connect with Afghanistan via the Caspian Sea, utilising Turkmenistan's port and rail infrastructure, which would integrate Russia into the Lapis Lazuli Corridor. This would establish a connection between India and Russia, and potentially Europe, through Turkmenistan and the Caspian port of Turkmenbashi, rather than through Uzbekistan.

**CONCLUSIONS:** Uzbekistan's best option for maintaining and enhancing its competitive advantages in trans-Eurasian and trans-Afghan transport is to accelerate construction of the Kabul Corridor, involving all Central Asian states financially to the maximum extent possible. Kazakhstan's practical support for developing the Kabul Corridor is important, as connecting it to the Northern Railway Route to Europe will enable Astana to receive an additional transit flow of up to [20 million tons](#) per year. This will preempt any potential competition from Astana and Ashgabat in developing trans-Afghan transport connections.

It would be worth proposing to Baku the joint promotion of a new multimodal corridor from India, Pakistan, Afghanistan, Uzbekistan and Kazakhstan to Azerbaijan, Georgia, and the EU. This would stimulate the development of the Middle Corridor by increasing transport from South Asia and Afghanistan to Europe via the Caspian Sea.

Moreover, an alternative should be developed to the Five Nations Route, instead envisaging a connection between China, Afghanistan and Iran through Uzbekistan and neighboring countries. This would ensure the profitability of the Mazar-i-Sharif-Herat railway project for Tashkent.

# UZBEKISTAN MAY BENEFIT FROM HERAT TO MAZAR-I-SHARIF RAILWAY PROJECT<sup>1</sup>

*by Nargiza Umarova*

## **Executive Summary:**

- Afghanistan, Iran, and Türkiye agreed on October 22 to jointly construct a railway between Afghanistan's cities of Herat and Mazar-i-Sharif as a part of the Five Nations Railway Corridor (FNRC).
  - The development of the FNRC—spanning the People's Republic of China (PRC), Kyrgyzstan, Tajikistan, Afghanistan, and Iran—will greatly benefit Tehran and Kabul as they increasingly facilitate trade to the PRC and seek to diversify their eastern trade routes.
  - The Herat–Mazar-i-Sharif line may alter Uzbekistan's transit role, offering it new access to Iran's ports but also risking loss of cargo traffic to Tajikistan and Iran if Tashkent does not become involved in the FNRC.

Afghanistan, Iran, and Türkiye have agreed to jointly construct a railway between Afghanistan's Herat and Mazar-i-Sharif ([Tolo News](#), October 24). Representatives from the three countries reached the agreement on October 22 at the Regional Assembly of the International Union of Railways in Istanbul. Each country will contribute financial, technical, and human resources to the project. A \$10 million technical and economic feasibility study is scheduled for completion by March 2026, with cargo trials to follow a year later ([South Asian Desk](#), October 25).

The extension of railway lines along Afghanistan's northern provinces positions it as a key transit hub in East–West connectivity through Eurasia. The October 22 agreement marks another milestone in the implementation of the Five Nations Railway Corridor (FNRC) concept, which gained momentum in the early 2000s (see [EDM](#), December 15, 2020). The 2,100-kilometer (1,205-mile) route features a single 1,435 millimeter standard gauge and spans the borders of the People's Republic of China (PRC), Kyrgyzstan, Tajikistan, Afghanistan, and

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<sup>1</sup> The Jamestown Foundation, November 12, 2025 // <https://jamestown.org/uzbekistan-may-benefit-from-herat-to-mazar-i-sharif-railway-project/>

Iran, with additional access to Türkiye and the European Union. The FNRC is designed to provide the shortest land connection between East Asia, the Middle East, and Europe, posing serious competition to transit routes from the PRC to the European Union via Central Asia, including the Middle Corridor, also known as the Trans-Caspian International Transit Route (TITR).

The development of the FNRC will have long-term consequences for transit through Uzbekistan. The launch of the railway from Herat to Mazar-i-Sharif could provide Tashkent with additional access to Iran's road transport and port infrastructure, bypassing Turkmenistan. This shift, however, will not have the desired effect unless the country participates in developing the Five Nations Corridor. The FNRC could also negatively impact Uzbekistan's role as a transit hub, redistributing cargo traffic between the PRC and Europe from Uzbekistan to Tajikistan and Iran.

In 2007, Tehran took the lead in implementing the FNRC, launching the construction of a 225-kilometer (140-mile) railway line from the Iranian city of Khaf to Herat, Afghanistan ([Railway Technology](#), December 16, 2020). The final section of this route is expected to be commissioned by next year. Once completed, the project would enable Afghanistan and Iran to transport up to 3 million tons of cargo across their shared border each year, mostly in transit flows. In March, 200 tons of Afghan dried fruit were transported to the European Union via the Khaf–Herat route ([Afghanistan International](#), March 27). The possible extension of the railway to Afghanistan's northeastern provinces, and then on to Tajikistan and Kyrgyzstan, could result in cargo flows traveling in the opposite direction, with final delivery to the PRC. This holds great promise for Iran, which is developing trade relations with the PRC and seeks to diversify its supply routes to the East ([PRC Ministry of Foreign Affairs](#), accessed November 12).

In 2017, Uzbekistan and Afghanistan signed an agreement to construct the Mazar-i-Sharif–Sheberghan–Maimana–Herat railway, which could subsequently be connected to the Khaf–Herat railway ([President of the Republic of Uzbekistan](#), December 5, 2017). To complete the Afghan section of the FNRC, the railway would only need to be extended from Mazar-i-Sharif to the Sher Khan Bandar in Kunduz Province, which borders Tajikistan. In 2019, Kabul reached an agreement with Dushanbe to construct a railway from the Afghan Sher Khan Bandar to the Tajik settlement of Jaloliddini Balkhi (Kolkhozobod) through Panji Poyon ([Asia-Plus Tajikistan](#), November 5, 2019). Both projects, however, remain unfinished. In the first case, Tashkent decided to pursue an alternative trans-Afghan route toward Pakistan, known

as the Kabul Corridor (see EDM, [January 15](#), [October 16](#)). In the second, the railway line in Tajikistan lacked funding.

Following the Taliban's 2021 seizure of power in Afghanistan, the issue of establishing a railway connection between the cities of Mazar-i-Sharif and Herat was once again on the agenda. In May 2023, the Taliban-controlled government approved the 1,468-kilometer (912-mile) Mazar-i-Sharif–Herat–Kandahar railway project, which they pitched to Russia as the shortest route to India through Afghanistan and Pakistan ([ATN News](#), May 2, 2023). The first phase involves constructing a 657-kilometer (408-mile) railway from Mazar-i-Sharif to Herat. In April, Moscow announced expanded cooperation with Uzbekistan on the Trans-Afghan Railway project ([Russian Ministry of Transportation](#), April 8). This announcement followed a statement by Mullah Baradar Akhund, the Afghan Deputy Prime Minister for Economic Affairs, following his visit to Tashkent in February ([RTA](#), February 23). Akhund unexpectedly announced that Uzbekistan intends to extend the railway from Hairatan to Herat—a project that was put on hold in 2017—and will finance preliminary studies along this route. The Uzbek side, however, has not confirmed these plans.

The construction of the Mazar-i-Sharif–Herat railway by Russia or even Uzbekistan would require introducing the railway standards of the Commonwealth of Independent States (CIS), including the 1,520 millimeter gauge, to Afghanistan. These standards would facilitate the objective of connecting northern and central Eurasia with South Asia. If Iran and Türkiye build the route, as recently announced, they would use the European standard gauge of 1,435 millimeters, making the primary purpose of the project to activate the Five Nations Corridor rather than the Trans-Afghan Corridor to Pakistan via Kandahar.

The FNRC is a shorter route than transport corridors passing through Kazakhstan, Uzbekistan, and Turkmenistan to the west. These three Central Asian republics are developing the Southern Railway Corridor to the European Union via Iran and Türkiye. Connecting the China–Kyrgyzstan–Uzbekistan railway—construction of which began in April 2025—with the Southern Corridor will shorten the trade route between East Asia and Europe by approximately 900 kilometers (559 miles) (see EDM, [July 17, 2024](#), [April 8](#)). This shortened distance could give Tashkent a competitive advantage in interregional transit transportation, but Uzbekistan risks missing out on this opportunity if the Five Nations Corridor continues to be developed. Tashkent could create a China–Kyrgyzstan–Uzbekistan–Tajikistan–Uzbekistan railway corridor, with the possibility of extending it to Afghanistan and Iran. This

route would involve Uzbekistan in the FNRC, making it a beneficiary of the Mazar-i-Sharif to Herat railway project.

## **THE IMPORTANCE OF TRANS-CASPIAN TRANSPORT IN EXTENDING CENTRAL ASIA'S TRANSIT POTENTIAL**

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# HOW DOES UZBEKISTAN DEVELOP TRANSPORT LINKS WITH THE SOUTH CAUCASUS?<sup>1</sup>

by Nargiza Umarova

The South Caucasus has high transit potential to link China and Europe, making it attractive to landlocked Central Asian states. Given the current geopolitical tensions in the world, the Central Asian countries have intensified efforts to diversify trade routes, with a particular focus on the Trans-Caspian International Transport Route (TITR) to connect with Europe.

Since the beginning of the war in Ukraine, demand for the TITR has increased significantly. International sanctions have weakened Russia's position in the Europe-China-Europe transit chain. Central Asian countries have begun to occupy this niche. The bulk of Chinese land cargo traffic, which had previously been northbound, has now been redirected to Central Asia. At the same time, the region has a unique opportunity to shed the status of a transport dead-end and become a transit hub of Eurasia. This prospect holds out great benefits for Uzbekistan, which is seeking to diversify foreign trade and extend its transit opportunities.

There is close interaction with Azerbaijan, the largest economy in the Transcaucasia region, which acts as a connecting link between two strategically important transport hubs – the Trans-Caspian and Trans-Caucasian corridors. Tashkent has always shown great interest in these routes, and in light of the escalation of the Ukrainian crisis, the issue of their effective use has become even more urgent.

Transit through the Caspian Sea and the South Caucasus is important for Uzbekistan in terms of accessing the European market. In April 2021, the republic joined the GSP+ preference system, which allows Uzbek producers to export more than 6,000 types of goods into the European Union duty-free. As a result, exports almost doubled in one year. Intensification of mutual trade leads to growth in the freight flow, which requires the

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<sup>1</sup> Caspian Policy Center, March, 21, 2025 // <https://www.caspianpolicy.org/research/economy/how-does-uzbekistan-develop-transport-links-with-the-south-caucasus-14005>

establishment of reliable transport communications and the elimination of problem areas in this segment.

Back in 2019, Uzbekistan, Kyrgyzstan, Turkmenistan, Azerbaijan, and Georgia [initiated](#) a multimodal corridor connecting Central Asia with Transcaucasia. Later, Türkiye joined. Thus, it was possible to launch a combined transport route Central Asia–South Caucasus–Anatolia+ (CASCA+). It became part of the international transit route between Asia-Pacific countries and Europe. In December 2022, the first container train was sent from Uzbekistan to the Bulgarian port of Burgas on CASCA+. The length of the route is more than 4,000 kilometers. This is the optimal distance for the Uzbek carrier, which, thanks to Turkmen transit, saves time and money on transporting goods. The effect is quite scalable, given the [start](#) of the China-Kyrgyzstan-Uzbekistan railway project. Obviously, this transport route will not end in Central Asia, but will be extended to the Caspian Sea, and at the maritime border of Azerbaijan will be replaced by a trans-Caucasus corridor.

Such a configuration will [reduce](#) journey distance from East Asia to Europe by 900 kilometers, and delivery time of goods by 7-8 days. This is a major advantage that drives the countries of Central Asia and the South Caucasus towards closer dialogue on transport logistics. Uzbekistan is particularly active, strengthening cooperation with Azerbaijan and Georgia. The main focus is on efficient use of rail and port infrastructure in both states. In particular, when entering the markets of Türkiye and Europe, Tashkent relies on the transit capacity of the Baku-Tbilisi-Kars (BTK) railway, which was put into operation in 2017. Demand for it has increased sharply due to the reorientation of much of the cargo flow from China to Central Asia, which has stimulated the development of trans-Caspian transport. The launch of new transport corridors using the potential of the railway line in the Turkish direction is not excluded. In this context, the capacity of the BTK was [increased](#) to 5 million tons per year.

Uzbekistan, along with other Central Asian states, [supports](#) the opening of the Zangezur (Nakhchivan) Corridor, which could become a strategically important component of land routes from East Asia to Europe. The economic value of the road through the Nakhchivan Autonomous Republic, which is an Azerbaijani exclave reached through Armenia, lies in its ability to [reduce](#) the route from Azerbaijan to Türkiye by 343 km, which will lead to huge savings in time and transit costs for transportation along the Europe-China-Europe axis. However, the launch of the Zangezur Corridor is complicated by the divergent positions of Azerbaijan and Armenia on this issue.

Another critical link in the transport connectivity of Central Asia and the South Caucasus is the Baku International Sea Trade Port, which services the entire flow of Uzbek cargo transported through the Caspian Sea. Over the past several years, its volume has exceeded 1 million tons per year. A similar result has been achieved using the Georgian Black Sea ports of Poti and Batumi, which serve as conduits to world trade. It is worth noting that Uzbekistan's interest in these facilities is not only operational, but also investment-driven.

In 2023, Tashkent announced its intention to construct sea terminals and warehouses in the ports of Poti in Georgia and the Baku port, as well as to implement joint shipbuilding projects with Azerbaijan. At the same time, it was agreed to develop one of the terminals of the deep-sea port of Chabahar in Iran. Long-term investments in maritime transport infrastructure, including the development of international trade ports, set a new trend in Uzbekistan's transport policy, while creating a good foundation for the effective implementation of the country's transit potential. All this correlates with the ambitious goal of increasing the volume of annual transit cargo to 22 million tons by 2030, which is becoming more realistic in light of the activation of the CASCA+ multimodal route as the demand for trans-Caspian transport increases.

At the same time, optimistic projections need to be supported by effective measures to remove administrative, legal and technical barriers that complicate the operation of international transport corridors, including TITR. In the current situation, urgent solutions are required to unify transport and transit tariffs, reduce customs duties, establish a single standard for transportation documentation, and simplify and accelerate border operations, and introduce IT technologies into the freight process, including electronic permit forms.

The resolution of problems depends on the willingness of the parties to compromise to achieve a mutually beneficial result. This approach is being successfully tested on the diplomatic track by Tashkent and Baku, both of which have raised the level of cooperation to a strategic partnership. Both countries have high transit potential and aim to benefit from it. Extending its logistics capabilities, Uzbekistan seeks to increase port cargo transport through Azerbaijan's infrastructure. In turn, Azerbaijan is interested in extending the planned China-Kyrgyzstan-Uzbekistan railway line to the Caspian Sea, which will strengthen its position in the international transit system.

The main focus of the Uzbek-Azerbaijani dialogue in this specific field is to minimize transportation costs and reduce delivery times. Mutual tariff preferences, especially for ferry transport, could be a good way of doing this. This issue is already under consideration, as is

the joint proposal of the parties to create a Trans-Caspian Digital Transit Portal to speed up border crossing processes. So far, Uzbekistan has managed to get discounts of up to 50% on the transport of goods by railways of Azerbaijan. This is a good result, which must be expanded upon.

# UZBEKISTAN CONFIDENTLY FORMS A NEW TRANSPORT ARCHITECTURE OF THE TURKIC STATES<sup>1</sup>

by **Nargiza Umarova**

In light of the intensive economic growth on the one hand, and the escalating geopolitical tension in the world on the other, Tashkent is actively enhancing the diversification of trade routes, with a particular focus on the development of transport communications in the western, eastern and southern directions. The key objective is not only to gain access to open seas and emerging markets, but also to reduce transport and logistics costs.

Sanctions imposed on Russia following the onset of the crisis in Ukraine have hampered the functioning of the Northern Corridor, which previously served as the primary route for Eurasian exports to Europe. Among other states, China actively used Russian transit, so at the height of the conflict it had to urgently redirect land transport to the Trans-Caspian International Transport Route (TITR) crossing Central Asia. This development has proven highly advantageous for Uzbekistan, as the country is located at the heart of region and maintains direct transport links with all Central Asian republics as well as Afghanistan.

Thanks to its strategic location, Uzbekistan has successfully integrated into the updated Europe-China-Europe logistics chain, creating significant potential for a multiple growth in transit cargo transport. In the near term, their volume is expected to increase to 22 million tons per year. An important factor in this is the close cooperation between Uzbekistan and the Turkic states.

In 2019, Uzbekistan joined the Organization of Turkic States (OTS), prioritizing the transport cooperation within this framework to give additional impetus to the intensification of mutual trade and extension of logistical capabilities of member countries. The Uzbek authorities emphasized the necessity of establishing and developing competitive transport corridors from China to Europe and South Asia, passing through the Turkic countries.

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<sup>1</sup> ANKASAM, April 9, 2025 // <https://www.ankasam.org/anka-analizler/uzbekistan-confidently-forms-a-new-transport-architecture-of-the-turkic-states-2/?lang=en>

Essentially, these initiatives aims to create a common transport axis with accompanying conditions for fast and barrier-free movement of goods.

Based on this approach, the Programme for the connectivity of the OTS countries in the transport sector was developed and adopted. Within the framework of the Organization, the Transport Coordination Committee has been established in order to swiftly address current challenges in organizing international transport. Additionally, mechanisms for regular meetings between heads of transport departments and railway administrations have been introduced.

Through active cooperation among the states of Central Asia, the South Caucasus, and Türkiye, several transport routes of interregional significance have been established.

In 2020 Uzbekistan, Kyrgyzstan, Turkmenistan, Azerbaijan and Georgia [launched](#) a multimodal transport corridor linking Central Asia with Transcaucasia. The parties agreed to apply preferential tariffs, which strengthened the viability of the new route. Türkiye later joined the project, contributing to the creation of Central Asia-South Caucasus-Anatolia (CASCA+) transport corridor. This route has been integrated into the broader international transit network connecting the Asia-Pacific region with Europe via China, Kyrgyzstan, Uzbekistan, Turkmenistan, Azerbaijan, and Georgia.

This concept fully meets Tashkent's requests for development and mutually beneficial use of the Trans-Caucasian Corridor, which serves as the gateway to Europe. Under the GSP+ preference system, Uzbekistan has the opportunity to [import](#) more than 6,000 types of goods into the European Union duty-free. This contributes to an increase of exports of Uzbek products, and, consequently, a higher volume of trade flows. In 2024, the volume of international cargo transport in Uzbekistan reached approximately [60 million tons](#). The share of the European segment in it continues to grow, which is due to the steady growth of mutual trade turnover, which by the end of 2024 [reached](#) €6.4 billion. Germany and France rank among the top ten trading partners of Uzbekistan.

Strengthening trade ties between Uzbekistan and the EU requires establishing reliable transport communications and eliminating problems for mutual supply. The launch of the Central Asia-South Caucasus-Anatolia route has become a significant step in this direction.

The valuable purpose of the CASCA+ project is to provide Central Asian states with access to the vast market of Türkiye, which is steadily expanding its economic presence in the region. Ankara holds the leading position in Tashkent's [foreign trade](#) and investment portfolio. Actually, [1,899](#) enterprises with Turkish capital are operating in Uzbekistan (ranking

third after China and Russia). The task has been set to increase the volume of bilateral trade to [\\$5 billion](#) in the shortest possible time, as well as to implement new investment projects totaling \$10 billion. To further stimulate trade, both countries plan to reduce customs tariffs under the Preferential Trade Agreement (PTA), fostering deeper economic cooperation.

This measure is reinforced by close coordination between Türkiye and Uzbekistan to eliminate various barriers in the mutual transport, including digitalization of transport services. Both countries have already [introduced](#) the E-Permit electronic permit exchange system, and are working on improving this process.

The joint declaration following the second ministerial meeting of the trilateral cooperation format between Uzbekistan, Azerbaijan and Türkiye in January 2025 in Ankara [expressed](#) a common will to develop cooperation to facilitate transit flows. This position correlates with the development of the CASCA+ transport corridor, which serves as a vital complement to the currently operating and growing popularity of the Trans-Caspian Route, also known as the Middle Corridor. The CASCA+ project involves three Central Asian states—Kyrgyzstan, Uzbekistan, and Turkmenistan—and notably bypasses Kazakhstan, a decision influenced by Tashkent's transit preferences. Uzbekistan prioritizes the Turkmenistan-Caspian route, as it offers shorter transit times and lower costs compared to routes passing through Kazakhstan.

In December 2022, the first container train [departed](#) from Uzbekistan to the Bulgarian port of Burgas on CASCA+. The length of the route is more than 4,000 kilometers. This route represents the optimal distance for the Uzbek carriers, since due to Turkmen transit, saves time and money on transporting goods. The effect is quite scalable, especially given the [start](#) of China-Kyrgyzstan-Uzbekistan railway project. Obviously, this transport route will not be confined with Central Asia, but will be extended to the Caspian Sea, and will be replaced by a Trans-Caucasus Corridor at the maritime border of Azerbaijan. This plan was first announced and supported by stakeholders in 2022 during the inaugural meeting of the dialogue format “Uzbekistan-Azerbaijan- Türkiye” in Tashkent.

It was [proposed](#) to create a consortium to coordinate the CASCA+ route in 2024. This will allow the project to reach an institutional level which will create a serious foundation in enhancing its competitive potential, and also transit capabilities of the countries of Central Asia, the South Caucasus and Türkiye.

The issue of increasing trade flows from Central Asia to Europe through the Caspian states and Türkiye is constantly on the agenda of specialized events of the Organization of

Turkic States. Thus, in the fall of 2022, the first meeting of the heads of railways of the member countries of the OTS – Uzbekistan, Azerbaijan, Kazakhstan, Kyrgyzstan and Türkiye – was held in Tashkent. The host party [noted](#) the growth dynamics of the railway transport, including container transport, in the Turkic countries. The international multimodal route Asia-Pacific–Europe played a crucial role in achieving such results.

Participation in such a large-scale project allows Uzbekistan to build a transport and logistics network of export and transit traffic bypassing Russia. In addition, Uzbekistan gets the fastest and cheapest way to deliver its own goods to global markets. The organization of land transit from East Asia to Europe through Kyrgyzstan and Uzbekistan [reduce](#) the intercontinental trade route by 900 kilometers, and delivery times of goods by 7–8 days. This efficiency is achieved by the ability to extremely rapidly transport from China to Uzbekistan using the Kyrgyz highways. Now it takes only [2 days](#) instead of 10 in transit through Kazakhstan. The launch of the China-Kyrgyzstan-Uzbekistan railway will further accelerate the process, which will strengthen the positions of Tashkent and Bishkek in the international transit track.

Uzbekistan's proactive policy to create alternative routes for goods deliveries in the western direction has a tendency to develop. This trend is characterized by the emergence of new trade routes oriented towards Europe using the transit potential of both the Turkic states and external actors. Among the latter, Iran stands out due to its geographic proximity to Central Asia and its efforts to establish robust connections with the region.

In 2022, Tashkent and Istanbul launched a regular railway route Türkiye-Iran-Turkmenistan-Uzbekistan with a length of over 4,500 km – the shortest land route between the two countries. The first freight train, equipped with 40 wagons, [arrived](#) from Izmir to Tashkent on December 3, 2022. The monomodal nature of the new corridor contributes to reduce the time and financial costs of transporting goods, enhancing its profitability and providing a basis for further development.

Under the current circumstances, a multimodal corridor Kyrgyzstan-Uzbekistan-Turkmenistan-Iran-Türkiye is also being formed. Earlier, agreements were [reached](#) between Tehran and Bishkek on organizing mutual transport through Uzbekistan and Turkmenistan. The railway line runs from the Iranian port of Bandar Abbas to the city of Osh near the Kyrgyz-Uzbek border. Extending the route to Türkiye will be an additional opportunity for Kyrgyzstan to access European markets, which will certainly benefit the country's economy.

Uzbekistan, being a relatively young member of the Organization of Turkic States, demonstrates a high level of activity in achieving the common goals and objectives of this association. The country's efforts to strengthen the Turkic transport partnership deserve special attention.

In 2019, following the proposal of Tashkent, a new multimodal route from Central Asia to Europe was activated through Kyrgyzstan, Uzbekistan and Turkmenistan further on with access to the maritime borders of the Southern Caucasus. This initiative soon evolved into a larger project CASCA+ and became part of the intercontinental logistics chain of the Asia-Pacific countries-China-Kyrgyzstan-Uzbekistan-Turkmenistan-Azerbaijan-Georgia- Europe, creating an alternative to the Middle Corridor.

The efforts of Uzbekistan to establish reliable export-transit routes in the western direction have a multiplier effect on the development of transport links and the extension of the transit potential of the OTS member countries. All this enhance to the Organization's authority, turning it into an effective international structure.

Close cooperation with the Turkic states allows Uzbekistan to diversify the geography of exports, integrate into international transport corridors, and minimize transit costs. This strategy bolsters economic growth both for the republic itself and for the entire Central Asian region.

# POTENTIAL FOR COOPERATION BETWEEN UZBEKISTAN AND ROMANIA IN DEVELOPING TRANS- CASPIAN AND BLACK SEA TRANSPORTATION TO EUROPE<sup>1</sup>

*by Nargiza Umarova*

The war in Ukraine has created a new reality in the geopolitical space of Eurasia, where Central Asia is acquiring exceptional significance in strategic communications between East and West. The region's connecting role, with its vast resource potential, offers ample opportunity to strengthen the economic power of the European Union in a rapidly changing world.

Central Asia, as an emerging independent subject of international relations, is committed to an open, pragmatic dialogue with the European Union (EU), which was demonstrated by the first joint high-level summit held on April 4, 2025 in Samarkand, Uzbekistan. This summit provided an opportunity to outline and align the positions of the parties regarding the priorities of the strategic partnership, as declared in the outcome document of the Samarkand meeting. It may serve as a valuable guide for the implementation of the updated EU Strategy for Central Asia, adopted in 2019.

At the current level of cooperation, Central Asia and the EU give high priority to the development of trade, economic, and transport ties. These areas are interdependent and, therefore, cannot be considered separately. Intensification of trade stimulates the growth of freight transport, which requires efficient routes. The same effect, only in reverse order, is achieved when establishing reliable transport communications – the existence and diversity of trade routes gives impetus to increased turnover.

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<sup>1</sup> Microstudies series “Building Geoeconomic Bridges: European Union – South Caucasus – Central Asia. Opportunities for Romania” of the European Institute of Romania, May, 2025 // <https://ier.gov.ro/en/news/editorial-release-building-geoeconomic-bridges-european-union-south-caucasus-central-asia-opportunities-for-romania/>

Based on the current geoeconomic interests of the EU in Central Asia, three trigger points for growth of interregional transport can be identified. These are cooperation in trade, energy and critical minerals. In this regard, Uzbekistan is ready to be a key partner.

Uzbekistan's foreign trade, including export performance, demonstrates steady growth. Thanks to the GSP+ system of preferences, since 2021, exports to the EU had nearly tripled, reaching [\\$1.15 billion](#). Duty-free exports have been established for more than 1,100 out of the 6,200 eligible product categories, including agricultural, textile, electrical engineering, and chemical products.

In 2024, the volume of international freight transportation in Uzbekistan reached approximately [60 million tons](#). The share of the European segment in it continues to grow, which seems to be a long-term trend, given Tashkent's targeted policy to develop the republic's transit potential by the implementation of promising transport corridors. In this regard, the partnership with Romania - one of the largest trade conduits between Central Asia and Europe - is of critical importance.

In terms of logistics, Uzbekistan and Romania cooperate within the framework of the TRACECA (Transport Corridor Europe-Caucasus-Asia) Programme and the Trans-Caspian International Transport Route (TITR). In 2019, at the proposal of the Uzbek side, the multimodal transport corridor Asia-Pacific Countries-Europe was launched, also known as CASCA+ (Central Asia-South Caucasus-Anatolia+). It involves the ports of Turkmenistan, Azerbaijan, Georgia, Romania and Bulgaria. Meanwhile, Bucharest is promoting its Caspian Sea-Black Sea International Transport Corridor (ITC-CSBS) project, where the port of Constanța is positioned as the main gateway to Central Europe. The idea of connecting the two seas has been supported by Tashkent in view of its active desire to diversify transport flows in the western direction, as well as the desire to use Turkmen transit to access the Caspian Sea and the South Caucasus.

In the future, it seems feasible to harmonize both corridors, which would lead to mutually beneficial outcomes. This would clearly expand the group of participants along the connecting route on the "China-Central Asia-Europe" axis. Potential interested parties may be Kyrgyzstan and Tajikistan, which traditionally rely on Uzbekistan's transit for transport to the EU via the Caspian and Black Seas. The construction of the China-Kyrgyzstan-Uzbekistan railway, which started in December 2024 with an estimated annual capacity of up to [15 million tons](#), and its further extension to the Turkmenbashi port on the Caspian Sea, will enhance the throughput capacity of the CASCA+ corridor, ensuring a stable cargo flow towards Romania's

Port of Constanța. This development, on one hand, will strengthen the transit positions of Tashkent and Bucharest, while on the other, will encourage the countries to enhance mutual coordination on the issue of interregional connectivity.

The dynamic growth of Uzbekistan's trade with the EU, which reached [€6.4 billion](#) in 2024, coupled with the parties' far-reaching plans to deepen investment partnerships in such critical sectors as green energy and the extractive industry, lays a solid foundation for the intensification of international freight transport from Central Asia to Europe using Romania's transport infrastructure. It is important to mention that this applies to the delivery of a wide range of goods, including energy.

With its strategic location at the crossroads of European trade routes, the largest port on the Black Sea, and an integrated network of railways and roads, Romania rightfully lays claim to the role of a transit energy hub. Bucharest is promoting the Southern Gas Corridor, aimed at diversifying energy supplies to the European market. This project is of particular interest to Central Asian states, which are seeking to expand the geography of their energy exports and are actively cooperating in this regard with Azerbaijan and Georgia — key transit nodes for deliveries between Central Asia and the EU.

Uzbekistan is actively expanding its solar and wind energy capacity, with the shares expected to reach [54 percent](#) of the country's energy mix by 2030. An estimated [10–15 billion kWh](#) of electricity will be transmitted to Europe. To this end, a "green energy corridor" is being developed, which envisions the laying of a cable along the seabed of the Caspian and Black Seas. The joint initiative of Uzbekistan, Kazakhstan and Azerbaijan aligns with Romania's strategic objective of becoming a distribution hub for energy flows from the South Caucasus and Central Asia, which will pave the way for Uzbek–Romanian relations to reach a qualitatively new level.

# WHY IS THE MIDDLE CORRIDOR NOT AN EQUAL PRIORITY FOR ALL CENTRAL ASIAN COUNTRIES?<sup>1</sup>

*by Nargiza Umarova*

According to World Bank estimates, Central Asian countries remain among the least connected economies in the world, has a negative impact on their well-being. At the same time, the region's share of global revenues from transport service exports does not exceed 1%. For this reason, creating and promoting on a mutually beneficial basis effective transit corridors that allow connecting the largest world markets through Central Asia has been prioritized today. One such corridor is the Trans-Caspian International Transport Route (TITR), also known as the Middle Corridor, which is involved in the East-West-East land connection.

In the current realities, the European Union (EU) has the greatest practical interest in the infrastructural development of this route. Within the framework of the Global Gateway initiative for the Central Asian republics, financial assistance in the amount of €10 billion has been announced. At the high-level Central Asia-European Union Summit on April 4, 2025, in Samarkand, the EU announced a further investment package for €12 billion. A quarter of this amount will be used to finance transport projects.

This dynamic is expected to contribute to the development formation of an extensive supply network stretching from Central Asia to Europe and beyond.

The intensification of trans-Caspian transport offers a range of geopolitical and geo-economic advantages.

First. Central Asia has a unique opportunity to transform itself into a Eurasian transit hub. This would strengthen the region's international subjectivity, which is crucial for establishing equal relations with influential actors of world politics.

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<sup>1</sup> IAIS Commentary Collection, May 14. 2025 // <https://iais.uz/en/outputnew/why-does-russia-need-a-trans-caspian-route-to-afghanistan>

Second. Expanding the potential of the Middle Corridor aligns with the national transportation strategies of Central Asian countries, which aim to diversify foreign trade flows. Developing freight transport in the west enables the region to reduce its dependence on northern routes and open up new export markets.

Third. The transport landscape of Central Asia is being radically transformed through the launch of new interregional trade routes, providing a solid foundation for strengthening intraregional connectivity and reducing the cost of transporting goods.

Fourth. Trans-Caspian transport facilitates to the expansion of trade, economic and investment cooperation with the EU, the countries of the South Caucasus and Turkey, which gives an additional impetus to Central Asia's development.

However, as recent studies have shown, for several objective reasons, the Middle Corridor cannot provide equal transit benefits to all five Central Asian republics. This is due to the disproportionate distribution of the potential West-oriented cargo flow among them. Kazakhstan accounts for more than 93% of the total volume, while Turkmenistan's share is 3%, Uzbekistan 2.3%, Kyrgyzstan 1.1%, and Tajikistan only 0.03%. It follows that the improvement of TITR has a positive impact on the economic development of Kazakhstan and Turkmenistan as the shortest and most convenient trade route to the EU. For Kyrgyzstan, Tajikistan and Uzbekistan, the Middle Corridor is one of the additional routes that will contribute to the diversification of export-import supplies with Southern Europe, the United States, Canada, and other foreign trade partners.

# WHY UZBEKISTAN SEEKS TO ESTABLISH A WEST-SOUTH TRANSPORT AXIS<sup>1</sup>

by Nargiza Umarova

**Uzbekistan's involvement in servicing transport and transit flows to Europe is minimal, presenting ample opportunities for development.**

Central Asia and the European Union are at present prioritizing the development of trade, economic and transport links. These areas are interrelated, and cannot be considered in isolation.

Europe remains one of the key players in Central Asia. The EU is Uzbekistan's third-largest trading partner after China and Russia.

Thanks to the GSP+ preference system, Uzbekistan has the opportunity to export more than 6,000 commodity items into the Eurozone duty-free. This contributes to an increase in trade and freight traffic. In 2024, the volume of international freight traffic in Uzbekistan was around 60 million tons. The share of European destinations continues to grow, reflecting the steady increase in mutual trade turnover, which reached 6.4 billion euro by the end of 2024. Uzbek exports accounted for \$1.7 billion of this total. The main export commodity (54 percent) was chemicals, including radioactive elements such as uranium. Germany and France are among Uzbekistan's ten largest trading partners, and the role of raw materials factor is important here too.

Central Asia and the EU are connected by three transport corridors: the northern route through Russia and Belarus, the middle route through the Caspian Sea, and the southern route through Iran.

The Northern Corridor includes both rail and road routes. Although it is the most developed in terms of infrastructure, its functionality is limited due to anti-Russian sanctions. The Middle Corridor is 2,000 kilometers shorter than the Northern Corridor, but due to its multimodality, it is inferior in terms of freight delivery speed. Nevertheless, its projected

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<sup>1</sup> The Diplomat, June 18, 2025 // <https://thediplomat.com/2025/06/why-uzbekistan-seeks-to-establish-a-west-south-transport-axis/>

carrying capacity is estimated at 25 million tons per year, which promises great prospects for the development of trans-Caspian transportation.

Cargo traffic along the Southern Corridor is the lowest, at up to 1.8 million tons, primarily due to technical issues. Anti-Iran sanctions are also having an impact. Despite these difficulties, routes through Iran to Turkey and Europe have potential for increased development, especially given the construction of the China-Kyrgyzstan-Uzbekistan railway and the China-Tajikistan-Uzbekistan highway.

Around 80 percent of all transport along the aforementioned corridors is by rail. However, there is a significant imbalance in the distribution of potential freight flows to Europe among the Central Asian countries. [According to recent studies](#), Kazakhstan accounts for more than 93 percent of the total volume, while Turkmenistan accounts for 3 percent, Uzbekistan for 2.3 percent, Kyrgyzstan for 1.1 percent, and Tajikistan for just 0.03 percent.

Uzbekistan's involvement in servicing transport and transit flows to Europe is minimal. In order to improve its position in this area, the country is implementing two major transport projects.

The first is the construction of the China-Kyrgyzstan-Uzbekistan railway, which will [shorten](#) the land trade route between East Asia and Europe by 900 kilometers and reduce delivery times by 7-8 days. Consequently, the Southern Corridor will become the shortest monomodal route connecting two global economic centers. It could also branch off to the Middle East (the Persian Gulf countries) and even the African continent.

It should be noted that a few years ago, work began on [establishing](#) the China-Kazakhstan-Uzbekistan-Turkmenistan-Iran-Turkey-EU railway corridor, which makes use of Kazakhstan's transit potential. Active steps are also being taken to [develop](#) the multimodal route from China to the EU via Kyrgyzstan, Uzbekistan, Turkmenistan and Iran. Once the international highway from China to the Uzbek border through Tajikistan is completed, another land route along the China-Europe axis will be established that is shorter than the existing one.

While the launch of the China-Kyrgyzstan-Uzbekistan railway will reinforce the importance of the southern transit route of the Middle Corridor, it will not be able to compete equally with the Kazakh section, as some experts predict or fear. This is because two transit routes pass through Kazakhstan – the northern and central routes – and both run through relatively flat terrain, unlike the railway line through mountainous Kyrgyzstan. Consequently, improving the Middle Corridor will only enable two Central Asian countries, Kazakhstan and

Turkmenistan, to increase their exports of transport services, as they have unimpeded access to the Caspian Sea. For the other republics in the region, this corridor will become one of the additional routes for delivering export cargo to Southern Europe.

The second major project is the construction of the Termez-Mazar-i-Sharif-Kabul-Peshawar railway, with access to the ports of the Indian Ocean. In the future, this Kabul Corridor may be connected to the Northern and Middle Corridors, forming the basis for new intercontinental logistics chains. In the first scenario, countries of Northern Europe, Russia and Belarus will gain land communication with the Indian subcontinent. In the second scenario, states of the South Caucasus, Turkey and parts of Europe will have a similar opportunity. In both cases, Uzbekistan will act as a transit hub, thereby strengthening its strategic position in the region.

# HOW WILL CENTRAL ASIA BENEFIT FROM THE EXTENSION OF TRANS-CASPIAN TRANSPORT ROUTES?<sup>1</sup>

*by Nargiza Umarova*

Azerbaijan is strengthening its transport diplomacy and investing in sustainable logistics infrastructure in the South Caucasus. Baku's strategic approach aims to combine two intercontinental transport projects, the East-West and the North-South corridors, which will strengthen the country's status as a Eurasian transit hub. Under these conditions, Uzbekistan has the opportunity to develop trade and transport links with the European Union bypassing Russia, while involving Azerbaijan in regional connectivity projects between Central and South Asia.

Azerbaijan plays a pivotal role in the operation of the Trans-Caspian International Transport Route (TITR) section of the Middle Corridor, linking Central Asia, the South Caucasus, and Türkiye via the Caspian Sea and integrating these regions into the global supply chain along the East-West axis. This route is also an integral component of the European program for international cooperation in organizing the Transport Corridor Europe-Caucasus-Asia (TRACECA) that was initiated in 1993.

The growing importance of trans-Caspian transport for trade between China, Central Asia and the European Union has spurred interest in developing the Middle Corridor's infrastructure. In the long term, this will allow the corridor, despite its multimodality, to compete with northern routes to Europe through Kazakhstan and Russia.

According to an analytical report prepared by experts from Central Asian countries and Azerbaijan, the Middle Corridor's carrying capacity could be increased to 25 million tons per year, equaling the Northern Corridor's projected potential. Achieving this result will depend largely on effectively solving the route's infrastructural, administrative, legal, and technical problems. Azerbaijan is doing a lot of independent work in this regard. In particular:

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<sup>1</sup> Caspian Policy Center, July 28, 2025 // <https://www.caspianpolicy.org/research/commentary/how-will-central-asia-benefit-from-the-extension-of-trans-caspian-transport-routes>

Large-scale extension of the Baku International Sea Trade Port in Alyat, which is a key link of transport routes between Central Asia and the Caucasus, is underway. It is planned to [increase](#) the port's capacity from 15 to 25 million tons per year. Azerbaijan also intends to increase its merchant fleet in the Caspian Sea to over 60 units by constructing [10 cargo ships](#).

The Georgian section of the 826-kilometer Baku-Tbilisi-Kars (BTK) railway has been modernized, increasing its capacity by fivefold to [five million tons per year](#). Work on developing station tracks, electrification, and integrating the transport line with Azerbaijan's port infrastructure is actively ongoing.

The Horadiz-Agbend railway leading to the border with Armenia is nearing completion and will become part of the Azerbaijani section of the Zangezur Corridor, necessary for a direct connection between Azerbaijan and Türkiye through the Nakhchivan Autonomous Republic (NAR). The second track of the previously existing railway with access to Türkiye is being laid in Nakhchivan. Its continuation will be the electrified double-track Igdir-Kars line. Only the 43-kilometer Armenian section of the Zangezur Corridor remains to be completed, the construction of which is complicated by the still unresolved relations between Baku and Yerevan. Once fully completed, the project will reduce the distance between Türkiye and Azerbaijan by [343 km](#), significantly saving time and costs for the transport of goods and expanding opportunities for cargo transport along the Middle Corridor.

Baku is promoting an alternative route along the Aras River on the Azerbaijan–Iran border that would achieve a similar effect. Initially, the [Aras Corridor](#) would be used for road transport, with the prospect of constructing a duplicate railway.

The infrastructural transformation of Azerbaijan's transport network, funded by the country itself, is helping to eliminate bottlenecks long the Middle Corridor and to strengthen its competitive advantages.

The extension of trans-Caspian routes, in addition to transit benefits, will provide Central Asia with a number of geopolitical and geo-economic advantages.

*First.* The region has a unique opportunity to overcome its transport isolation and transform into a Eurasian transit hub. This would strengthen its international status, which is crucial for establishing equal relations with influential actors of world politics.

*Second.* Expanding the potential of the Middle Corridor aligns with the national transportation strategies of Central Asian countries that aim to diversify foreign trade flows. Developing freight transport in the west enables the region to reduce its dependence on northern routes and open up new export markets.

*Third.* The transport landscape of Central Asia is being radically transformed due to the launch of new interregional trade routes, providing a solid foundation for strengthening intraregional connectivity and reducing transport costs.

*Fourth.* Trans-Caspian transport facilitates the expansion of trade and economic and investment cooperation with the European Union, with the countries of the South Caucasus, and with Türkiye, which gives an additional impetus to Central Asia's development.

In 2024, [4.5 million tons](#) of cargo were transported via the Middle Corridor (through Kazakhstan, Azerbaijan, Georgia, and various Caspian Sea ports), which is 62% more than a year earlier. The volume of Uzbek transport during this period reached 1 million tons.

The World Bank predicts an increase in cargo traffic along the Middle Corridor to [11 million tons](#) by 2030. The share of transcontinental trade in the total volume is expected to be only 40%, including 1.3 million tons of potential transit cargo from Uzbekistan to Europe. At the same time, Uzbekistan will also need to use the transit services of neighboring Kazakhstan.

Experts emphasize that, following the construction of the China-Kyrgyzstan-Uzbekistan railway and its extension to the Turkmenbashi port on the Caspian Sea, there will not be a significant reorientation of cargo traffic from China to Europe towards the southern route of the Middle Corridor. Therefore, it can be concluded that improving the Middle Corridor will provide an opportunity to increase the export of transport services only to two Central Asian states: Kazakhstan and Turkmenistan. The other republics will demand this route more in the context of developing bilateral trade with Azerbaijan, Georgia, and Türkiye.

For Uzbekistan, it is much more efficient to [establish](#) transport links with Europe via Iran, since this will enable the country to fully realize its transit potential. Work is underway to establish the China-Kazakhstan-Uzbekistan-Turkmenistan-Iran-Türkiye-EU railway corridor.

The launch of the China-Kyrgyzstan-Uzbekistan railway will form a new configuration of this route that will [reduce](#) the trade route between East Asia and Europe by 900 km, and cut cargo delivery times by 7–8 days. Consequently, the Southern Corridor will become the shortest monomodal route connecting two of the world's major economic centers, China and Europe. It could also branch off to the Middle East (the Persian Gulf countries) all the way to the African continent. And the Iranian Aras Corridor project could provide Central Asian countries with an alternative exit to the South Caucasus bypassing the Caspian Sea.

As the Trans-Afghan Railway project to Pakistan along the Termez-Naibabad-Logar-Kharlachi route is being implemented, it seems advisable to connect it with the Middle Corridor. This will establish an overland connection between the Indian subcontinent, Central Asia, the Caucasus, and Europe. The new multimodal India-Pakistan-Afghanistan-Uzbekistan-Kazakhstan-Caspian Sea ports-Azerbaijan-Georgia-EU corridor will increase transit traffic through Central Asia by redistributing the potential flow of cargo from Afghanistan to Europe in favor of Uzbekistan. The project could also be considered an alternative to the Lapis Lazuli Corridor involving Afghanistan, Turkmenistan, Azerbaijan, Georgia and Türkiye.

## **TO THE SOUTHERN SEAS: TRANSPORT COOPERATION WITH IRAN**

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# TRUMP'S 'MAXIMUM PRESSURE' ON IRAN COMPLICATES CENTRAL ASIAN EXPORT ROUTES<sup>1</sup>

by Nargiza Umarova

**Changing U.S. policies present both risks and opportunities for countries like Uzbekistan, which have looked to Iran to connect them to global markets via the sea.**

On February 4, 2025, U.S. President Donald Trump signed an executive order reimposing “maximum pressure” on the government of the Islamic Republic of Iran. The anti-Iranian campaign is intended to deprive the country of any financial gain, including oil exports, port operations, and ancillary industries.

Under the order, the U.S. State Department is tasked with reviewing sanctions waivers related to Iran, particularly those regarding the deep-sea port of Chabahar. The possible rescinding of sanctions waivers related to the port will primarily affect the geoeconomic interests of India, which has been modernizing Chabahar for many years and has spent several tens of thousands of dollars on the project. The port plays a critical role in New Delhi’s transport strategy, providing access to the markets of Iran, Afghanistan and Central Asia, bypassing its main opponent in the region, Pakistan. At the same time, Chabahar is a key link in the supply chain between India and Russia, organized under the International North-South Transport Corridor (INSTC).

In 2018, having obtained sanctions relief from Washington on Chabahar in exchange for refusing to import Iranian oil, India took over the management of the Shahid Beheshti port terminal. In May 2024, Tehran and New Delhi signed a 10-year contract to operate the Chabahar port. An initial agreement between the two countries was first reached in 2016, against the backdrop of the conclusion of a nuclear deal with Iran by the P5+1 -- the U.N. Security Council’s five permanent members (China, France, Russia, the United Kingdom, and the United States) plus Germany. Later, Afghanistan joined the Chabahar Agreement, seeking to gain access to sea routes in the Indian Ocean.

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<sup>1</sup> The Diplomat, February 28, 2025 // <https://thediplomat.com/2025/03/trumps-maximum-pressure-on-iran-complicates-central-asian-export-routes/>

Under the updated contract, India intended to [invest](#) \$370 million to improve Chabahar's infrastructure. However, restoring the “maximum pressure” campaign on Iran by the United States could derail this plan and threaten the further development of the strategically important transport hub.

New Delhi will likely try to shield Chabahar from a new wave of anti-Iran sanctions, as it did in 2018 during Trump's first presidency. Indian Prime Minister Narendra Modi likely discussed the issue with his American counterpart during their recent talks in Washington.

The port of Chabahar has direct access to the Indian Ocean, making it a valuable asset for many countries in continental Asia. The facility is involved in the operation of international trade routes connecting Central Asia with the Middle East. The earliest of these was [launched](#) in 2016 on the basis of the Ashgabat Agreement. The Central Asia-Persian Gulf transport and transit corridor consists of two parts: one running on the Uzbekistan-Turkmenistan-Iran railway, and the other via sea from the Iranian ports of Bandar Abbas or Chabahar to the Oman coast of the Persian Gulf.

Uzbekistan, a landlocked country, has shown particular interest in the transit potential of Chabahar. Tashkent was [granted](#) the right to jointly use the Iranian port in the open ocean. The construction of a logistics center on the Shahid Beheshti terminal is [planned](#), which is expected to boost Uzbekistan's foreign trade, including with such an economic giant as India. In 2024, trade between Uzbekistan and India reached almost [\\$1 billion](#). For greater efficiency the parties intend to [create](#) a new multimodal corridor, Uzbekistan-Turkmenistan-Iran-India, using the Chabahar port. Other Central Asian countries, such as Kyrgyzstan and Tajikistan, which depend on Uzbek transit for access to sea routes, may join this project in the future.

Iranian ports have also attracted the attention of the Taliban government in Afghanistan. Tensions with Islamabad, caused in part by Pakistan's [tightening](#) policies on Afghan transit cargo, have pushed the Taliban to actively use Chabahar as an alternative to maritime transportation through Pakistan. The Khaf-Herat railway, which Iran has almost [completed](#), will create even more favorable conditions for such a reorientation.

If the activities of the Chabahar port and other Iranian transport facilities are restricted under U.S. pressure, the Central Asian states and Afghanistan would lose a reliable source of transit services and would have to rely solely on Pakistan for access to the southern seas.

This will certainly strengthen Islamabad's position in the international transport system, as well as the geopolitical effect of the [China-Pakistan Economic Corridor](#) (CPEC), known as the flagship project of the China's Belt and Road Initiative (BRI). Under the CPEC, China is

sponsoring infrastructure development of Pakistan's Gwadar port, which is located on the same coastline as Chabahar. These projects are supported by opposing powers India and China, making competition between them inevitable. Containing the development of the Chabahar port through international sanctions will lead to an outflow of goods to Pakistan, benefiting Beijing but harming India by complicating its land route to Central Asia. This development is likely to result in additional freight costs and a slowdown in mutual trade.

Another beneficiary of Pakistan's growing transit importance could be Uzbekistan, which initiated the creation of the [Kabul Corridor](#) (Termez-Mazar-i-Sharif-Kabul-Peshawar railway). The implementation of the \$6.9 billion project has been delayed for financial reasons. Perhaps stimulating demand for cargo transport through Pakistani ports could increase its investment attractiveness, accelerating the construction of the Trans-Afghan Railway and expanding opportunities for economic cooperation between Central and South Asia.

# WHY IS IRAN STRENGTHENING ITS TIES WITH CENTRAL ASIA?<sup>1</sup>

by Nargiza Umarova

**Its extensive road and railway network, coupled with major ports in the Indian Ocean, gives Iran an important advantage in cooperation with the landlocked Central Asian republics.**

The Islamic Republic of Iran, under the leadership of President Masoud Pezeshkian, is noticeably strengthening its policy in Central Asia. The main focus of Iran's regional interaction is aimed at developing trade and transport logistics links. This aligns with Iran's "Look East" strategy, which is intended to mitigate Tehran's economic isolation.

International sanctions remain the main obstacle to the Iran's integration with Central Asia. Despite their geographical proximity and significant resource potential, the total volume of mutual trade remains relatively low at just over [\\$1.5 billion](#), although this figure has grown slightly in recent years. Iran's goal is to increase trade with Uzbekistan fourfold to [\\$2 billion](#), while increasingly trade with [Kazakhstan](#) and [Tajikistan](#) to \$1 billion, each, and with Turkmenistan by [30 percent](#).

The Central Asian states are, meanwhile, seeking out new consumer markets and more efficient connections to the world's major economies. Iran combines both these qualities, making it a valuable partner for the region. Furthermore, Iran boasts solid scientific and technical expertise in engineering, energy, agriculture, chemicals and pharmaceuticals, and has an investment base for joint production.

Its extensive road and railway network, coupled with major ports in the Indian Ocean, gives Iran an important advantage in cooperation with the landlocked Central Asian republics. Tehran plays a pivotal role in the Eurasian Land Bridge connecting China and Europe by rail. Several overland transit routes from east to west pass through Iran by land, which also involve the Central Asian countries. The China-Kazakhstan-Uzbekistan-Turkmenistan-Iran-Turkey-EU railway corridor is being actively developed, and the China-Kyrgyzstan-Uzbekistan-Turkmenistan-Iran-Turkey-EU multimodal route is operating in parallel.

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<sup>1</sup> The Diplomat, May 29, 2025 // <https://thediplomat.com/2025/05/why-is-iran-strengthening-its-ties-with-central-asia/>

The Iranian deep-water port at Chabahar is of particular interest to the Central Asian republics seeking to expand the southern transit direction. Chabahar is being modernized by India and thanks to its efforts, the port is not burdened by sanctions. In 2023, Tehran [approved](#) Tashkent's request to join the Chabahar Agreement. The Uzbek side plans to build warehouses and a terminal at the seaport. Kazakhstan and Tajikistan are considering a similar approach. Discussions are also underway to launch transport corridors from Central Asia to India using Iran's road and port infrastructure. This would boost trade with one of the world's largest economies, which is fully aligned with the geoeconomic interests of the Central Asian states.

In August 2024, container shipping [began](#) from the Indian ports of Mundra, Nhava Sheva and Chennai to Uzbekistan via Iran (utilizing Bandar Abbas port) and Turkmenistan. In March 2025, cargo deliveries to Kazakhstan were [organized](#) along the same route. In addition, Astana intends to [construct](#) a specialized terminal and logistics center at the Shahid Rajaee port in southern Iran. These developments demonstrate the Central Asian states' determination to strengthen their ties with Tehran.

Central Asian transit is also very important for Iran, given the reorientation of its foreign trade to the east. A full-fledged free trade agreement between the countries of the Eurasian Economic Union (EAEU) and Iran came into force on May 15, 2025, providing for a sharp reduction in customs duties on most commodities. Russia, which is the dominant economy in the EAEU and has an impressive trade turnover with Iran ([\\$4.8 billion](#) in 2024), will benefit the most from the free trade agreement. However, China remains Tehran's largest trade partner in the east. Non-oil bilateral trade was valued at [\\$34.1 billion](#) in the last Iranian calendar year, which ended on March 20, 2025. Therefore, it can be assumed that these countries will pay even greater attention to developing transport communications through Central Asia.

# UZBEKISTAN WEIGHS RISKS OF CHABAHAR INVESTMENT<sup>1</sup>

by *Nargiza Umarova*

## **Executive Summary:**

- Uzbekistan's plans to build infrastructure facilities at the Iranian Chabahar port to gain direct access to the Indian Ocean have not been implemented, indicating Tashkent's possibly cautious approach to this issue.
- New Delhi is strengthening its economic ties with Russia and the People's Republic of China (PRC) through ongoing negotiations to create a free trade zone with the Eurasian Economic Union.
- Tashkent is pivoting toward an alternate Trans-Afghan railway corridor linking Uzbekistan, Afghanistan, and Pakistan, aiming for a faster, more direct Eurasia–South Asia route and reduced dependence on Iranian infrastructure.

On September 29, the U.S. State Department's decision to reimpose sanctions on the Iranian port of Chabahar came into effect ([U.S. Department of State](#), September 16). This move reflects Washington's current maximum pressure policy to isolate the Iranian regime. Renewed sanctions will hinder the development of Chabahar, affecting the economic interests of Tehran and other countries, such as India and Russia, that participate in trade routes involving the port. India, Iran, and Russia are increasing mutual trade and are keen to establish fast transport links with each other. The International North-South Transport Corridor (INSTC) is one such joint infrastructure project, and currently hinges on the deep-water port of Chabahar (see [EDM](#), April 18, 2022). Additionally, Iranian land transit can reduce the cost and time of transporting goods from India to Central Asia and back compared to sea routes through Europe or the People's Republic of China (PRC).

New Delhi is seeking closer economic ties with Russia (see [EDM](#), September 10). Indian negotiations on establishing a free trade zone with the Eurasian Economic Union (EAEU) have progressed, offering a promising boost to India's trade presence in Eurasia ([Trans.ru](#), August 25). The prospective free trade zone increases the need for interregional transport connectivity, which is the purpose of the INSTC and the Chabahar Agreement signed by India,

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<sup>1</sup> The Jamestown Foundation, October 16, 2025 // <https://jamestown.org/uzbekistan-weighs-risks-of-chabahar-investment/>

Iran, and Afghanistan in 2016. In 2018, it was the Afghan factor at the time that helped New Delhi convince Washington to provide a sanctions waiver for Chabahar. The seaport serves as a trade gateway for Indian manufacturers to reach Iran, Afghanistan, and Central Asia. In May 2024, India signed a 10-year contract with Iran to operate the port and pledged an additional \$370 million to transform the transport hub's infrastructure ([The Hindu](#), May 13, 2024).

In 2023, trade between India and the Central Asian countries amounted to \$1.7 billion ([Eurasian Development Bank/India Exim Bank](#), 2025). Kazakhstan accounted for over half of India's regional imports, which consisted mainly of mineral fuels and oil, and Uzbekistan was the primary Central Asian buyer of Indian exports.

In 2024, the value of trade between Uzbekistan and India approached \$1 billion ([National Statistics Committee of Uzbekistan](#), January 21). Plans are in place to grow this trade through a new multimodal corridor between Uzbekistan, Turkmenistan, Iran, and India, utilizing the port of Chabahar (see [EDM](#), October 16, 2023). In the Central Asian segment, the new route could be extended to Kyrgyzstan and Tajikistan for their access to the open seas.

Since 2020, Tashkent has been engaging in dialogue with New Delhi and Tehran within a special working group on the joint use of the deep-water port of Chabahar, which has direct access to the Indian Ocean. In 2023, the group reached an agreement to construct a logistics center, along with terminals and warehouses, at the Shahid Beheshti Port in Chabahar ([Spot](#), June 19, 2023; see [EDM](#), June 21, 2023). These plans have not yet been implemented, which may signal Uzbekistan's cautious approach to investing in the development of the Iranian Chabahar port. Renewed sanctions on Chabahar are likely to reinforce this caution, but Uzbekistan is unlikely ignore the port's transit potential—Tashkent needs to diversify its southern logistics routes to minimize security risks and optimize international transportation costs (see EDM, [May 7, 2024](#), [April 8, 2024](#), [May 21, 2024](#), [July 7, 2024](#)).

The first trilateral political consultation meeting between Iran, India, and Uzbekistan was held in Tehran on September 9, during which the countries discussed the effective use of Iran's port facilities and transport infrastructure to expand mutual trade ([Iran Ministry of Foreign Affairs](#), September 13). During the meeting, however, the Uzbek delegation did not mention the implementation of investment agreements in Chabahar.

Investing in the Iranian port is unlikely to be profitable for Tashkent, given that Uzbekistan is only involved in 5.5 percent of cargo traffic between Central Asia and India. Most Central Asian trade with India occurs with Kazakhstan (61.1 percent) and Turkmenistan (29.4 percent). This is partly due to the composition of Kazakh and Turkmen exports to India,

which consist mainly of hydrocarbon raw materials and inorganic chemical products ([Centermano.uz](#), July 9). Another reason is that Astana and Ashgabat participate in the flagship Indo-Russian-Iranian project INSTC, from which Uzbekistan was excluded due to the construction of the Kazakhstan–Turkmenistan–Iran railway in 2014 (see EDM, [October 3, 2014](#), [January 14](#), [December 4, 2015](#)).

In 2022, Tashkent proposed an alternate land route connecting Russia and India via Central Asia, Afghanistan, and Pakistan, bypassing Iran ([Uzbekistan Ministry of Transportation](#), November 25, 2022). A year later, as part of the Shanghai Cooperation Organization (SCO) Member States Transport Forum, the process of creating a 5,532-kilometer (3,440-mile) multimodal transport corridor between Belarus, Russia, Kazakhstan, Uzbekistan, Afghanistan, and Pakistan was launched (see [EDM](#), January 15). This new logistics chain aims to enable cargo to be transported from northern Eurasia to South Asia in just 20 days—three times faster than by sea. Extending the corridor to Europe and India will create conditions for land transport connectivity between two major economic centers of world trade. If the Uzbekistan–Afghanistan–Pakistan railway (the Trans-Afghan or Kabul Corridor) is constructed, and if the transport systems of the Commonwealth of Independent States countries and the Indian subcontinent are integrated, the resulting land route would be monomodal, making it streamlined and more economically viable (see [EDM](#), July 7).

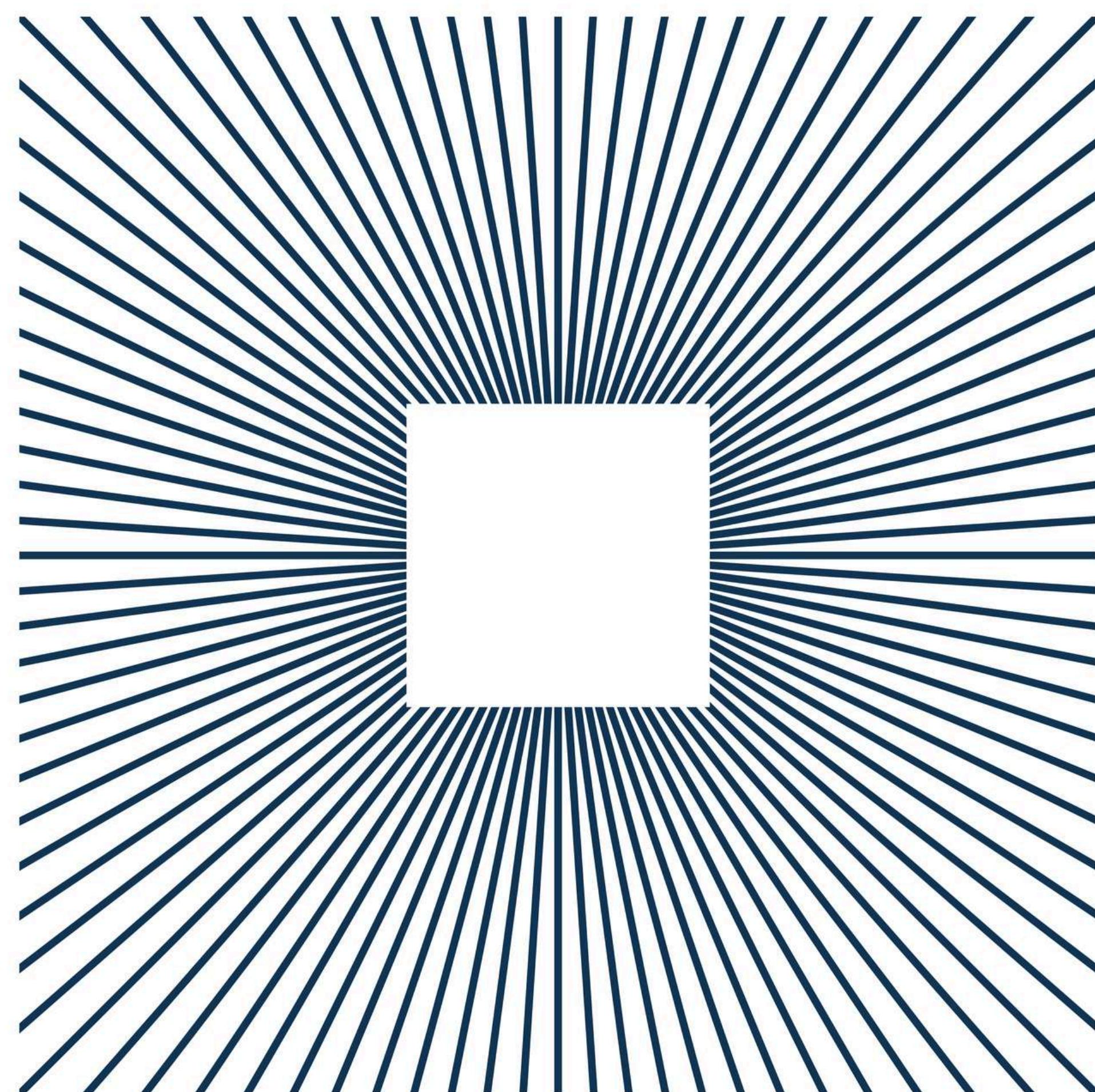
In this regard, Tashkent is accelerating the implementation of the Kabul Corridor project, which is estimated to cost around \$7 billion and follows the Termez–Naibabad–Maidanshahr–Logar–Kharlachi route. On July 17, Uzbekistan, Afghanistan, and Pakistan signed an intergovernmental framework agreement for the feasibility study of the project ([Tolo News](#), July 17). According to one preliminary estimate, the potential cargo flow on the Trans-Afghan railway is expected to be 22 million tons per year by 2030, increasing to 34 million tons by 2040 ([YouTube/@Транспортные коридоры ЦА](#), August 5). Most of this cargo will be in transit to farther-flung markets, including goods destined for India.

Tashkent may strengthen cooperation with New Delhi at the diplomatic and ministerial levels to secure its support to develop a railway corridor through Afghanistan and Pakistan. Investment in this alternative route has a different, though significant, risk profile compared to Chabahar, based on the international isolation of Taliban-controlled Afghanistan. The Trans-Afghan Corridor could be realized through Uzbekistan’s initiative to form a unified SCO transport space, integrating the railway networks of the organization’s members ([Institute for Advanced International Studies](#), September 8).

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